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FES
Factor Evaluation System

POSITION CLASSIFICATION STANDARD FOR

Personnel Clerical and Assistance Series GS-203

TS-75
November 1985

United States
Office of Personnel Management
Office of Standards Development

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PERSONNEL CLERICAL AND ASSISTANCE SERIES

CONTENTS

Page

Series Definition 1
Exclusions 1
Series Coverage 2
Authorized Titles 5
Impact of Automation 6

PART I, PERSONNEL CLERICAL POSITIONS

Occupational Information 7
Grading of Personnel Clerical Positions 15
Grade Conversion Table 16
Factor Level Descriptions for Personnel Clerical Positions 16
OPM Benchmark Positions
GS-203-3, Benchmark 1, Staffing Clerk (Typing) 34
GS-203-4, Benchmark 1, Staffing Clerk (Typing) 37
GS-203-4, Benchmark 2, Staffing Clerk 41
GS-203-4, Benchmark 3, Personnel Actions Clerk (Data Transcribing) 45
GS-203-5, Benchmark 1, Personnel Actions Clerk 49
GS-203-5, Benchmark 2, Personnel Actions Clerk 53
GS-203-5, Benchmark 3, Personnel Actions Clerk (Typing) 57
GS-203-5, Benchmark 4, Staffing Clerk (Typing) 62

(TS-75)
November 1985

BEST COPY AVAILABLE

CONTENTS

Page

PART II, PERSONNEL ASSISTANT POSITIONS

Occupational Information 67

Grading of Personnel Assistant Positions 72

Grade Conversion Table 73

Factor Level Descriptions for Personnel Assistants 74

OPM Benchmark Positions

GS-203-6, Benchmark 1, Staffing Assistant 99

GS-203-7, Benchmark 1, Staffing Assistant 103

GS-203-7, Benchmark 2, Staffing Assistant 107

GS-203-7, Benchmark 3, Staffing Assistant 110

(TS-75)
November 1985

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PERSONNEL CLERICAL AND ASSISTANCE SERIES

This series includes all positions the primary duties of which are to supervise, lead, or perform: (1) clerical work requiring substantial knowledge of civilian personnel terminology, requirements, procedures, and functions to process documents (applications for employment, promotion, Federal benefits and services, training, official personnel actions, etc.), prepare recurring personnel reports, explain personnel procedures, maintain master personnel and organizational records, and provide miscellaneous clerical support in personnel-related units; and (2) limited technical work requiring substantial practical knowledge of one or more civilian personnel management specialties such as staffing, employee relations, and classification. These positions do not require the broad knowledge of Federal personnel systems or the depth of knowledge about personnel management concepts, principles, and techniques which are characteristic of the recognized personnel management specialist positions.

This standard supersedes the classification standard for the Personnel Clerical and Assistance Series dated June 1966.

EXCLUSIONS

1. Support positions requiring knowledge of processing requirements and procedures applicable to military personnel are classified in the Military Personnel Clerical and Technician Series, GS-204.

2. Positions which involve clerical posting, maintenance of files, typing, receptionist tasks, and administration and scoring of tests, without responsibility for learning civilian personnel processes, procedures, and functions, are classified to an appropriate occupation in the GS-300 Group.

3. Principal office clerical or administrative support positions requiring knowledge of the organization, its objectives, and lines of communication to perform support work for an individual and, in some cases, for the subordinate staff of that individual are classified in the Secretary Series, GS-318.

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4. Positions in which the paramount knowledge and primary duties involve computer data processing sequences, controls, procedures, or programing languages are classified to the Computer Clerk and Assistant Series, GS-335.

5. Positions involved primarily in operating keyboard-controlled equipment to transcribe, verify, input, or correct information in a data processing system are classified to the Data Transcribing Series, GS-356.

6. Positions involved primarily in the coding of personnel records and actions are classified to the Coding Series, GS-357.

7. Support positions requiring a practical knowledge of the methods, procedures, regulations, and purposes of equal opportunity or civil rights programs are classified to the Equal Opportunity Assistance Series, GS-361.

8. Support positions requiring knowledge of civilian payroll rules, regulations, procedures, and functions are classified to the Payroll Series, GS-544.

9. Positions requiring a broad knowledge of Federal personnel systems and/or an indepth knowledge of the underlying concepts, principles, and techniques characteristic of one or more of the recognized personnel management specialties are classified to the appropriate specialist or management series in the Personnel Management and Industrial Relations Group, GS-200.

SERIES COVERAGE

The information in this standard is presented in two parts: Part I covers personnel clerical work; Part II covers personnel assistance work. When classifying positions by the criteria in this standard, it is important to first identify the type of position being classified; i.e., personnel clerk or personnel assistant. Duties of the position being evaluated should be carefully reviewed in relation to the way the duties are performed and the purpose of the position.

The distinctions among positions properly classified as personnel clerks, personnel assistants, and personnel specialists may not always be obvious. For this reason, the following comparisons between the kinds of work are made.

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Clerks Versus Assistants

As described in Part I of this standard, clerks process documents (applications for employment, promotion, Federal benefits and services, training; official personnel actions; etc.), prepare recurring personnel reports, explain personnel procedures, and provide miscellaneous clerical support in personnel-related units. In this work, the clerks complete forms with information, resolve factual discrepancies, and describe established steps for making applications. They may have many options in doing the work because of the wide variety of kinds of information and transactions or the interrelatedness of different procedures. However, the work is governed by clear requirements and specific conditions covering the kind of facts needed (names, dates, position numbers, regulatory authorities, examination scores, etc.); supporting evidence required (doctor's certificate, honorable discharge from military service, records of previous Federal service, etc.); and the treatment of such facts (forms to be used, codes to be used, dates of service which are creditable, tables for converting raw scores to final scores, etc.).

Personnel assistants are distinguished from clerks in that they, for a significant period of time, do limited technical work such as searching out and organizing personnel subject-matter facts and weighing, measuring, or comparing facts of the case/situation being handled against established criteria. Assistants need a greater depth of personnel subject-matter knowledge than clerks to seek out established criteria (described in terms of work characteristics, experience and education requirements, circumstances regarding complaints or minor infractions of rules, etc.) to determine the key elements to be considered in making judgments (e.g., determining the relative value or adequacy of a set of facts, and points to be stressed or given special treatment). Skill is often required in interviewing people to ask questions which will elicit the kind of information needed, to change the line of questioning to meet different circumstances, or to probe deeper into the facts, as warranted. The career ladder of personnel assistants is typically from personnel clerical positions.

Examples of the differences between clerks and assistants in the various specializations are given under Factor 1 of the Factor-Level Descriptions for Personnel Assistants (Part II).

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Specialists Versus Assistants

Full-performance specialists use broad personnel management knowledges, concepts, and principles in performing a wide variety of work in a personnel specialty. In contrast, assistants have boundaries which narrowly restrict their technical work within the specialty, such as:

—Use of a limited variety of techniques, standards, or regulations;

—Responsibility for a narrow band of occupations or grade levels; and

—Problems limited to recurring types for which precedents have been established.

These limitations impact upon the breadth and depth of knowledges required, the complexity of problem solving, the applicability of guidelines, and/or the closeness of supervisory controls.

Although some personnel assistant duties may be similar to those of personnel specialist trainees, specialist trainees are in temporary stages of development performing assignments requiring more judgment and analysis. Assistant positions often include continuing clerical duties along with the limited technical work, and the assignments are not usually designed to develop skills for progressing to higher grade personnel specialist positions.

Similar Positions in Other Occupations

Agencies organize their work to meet ever-changing needs and shifts in program emphasis. For example, training, incentive awards, test administration, or labor relations program activities may be integral parts of personnel offices or organizationally isolated from such offices. On occasion, administrative offices may include positions which maintain promotion registers, prepare vacancy announcements, conduct orientations for new employees, explain options and fill out forms for Federal employee benefits, maintain position controls, etc. Criteria in this standard may be used to evaluate such positions in the absence of standards specifically covering the work performed. However, title and series determinations should be based upon the qualifications required and knowledges gained in performing work which may impact upon career ladder opportunities.

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AUTHORIZED TITLES

Titles in this occupation are authorized as follows:

1. *For nonsupervisory clerks evaluated by Part I of this standard*

   — Specialized clerical titles are:

   - o *Staffing Clerk*
   - o *Personnel Actions Clerk*

   — A general title of *Personnel Clerk* is to be used for all other personnel clerical positions which provide clerical support for classification, employee development, employee relations, or labor relations functions or for positions that support two or more personnel specialties.

2. *For nonsupervisory assistants evaluated by Part II of this standard*

   — Specialized assistant titles are:

   - o *Classification Assistant*
   - o *Employee Development Assistant*
   - o *Employee Relations Assistant*
   - o *Labor Relations Assistant*
   - o *Staffing Assistant*

   — A general title of *Personnel Assistant* is to be used for all other assistant positions; i.e., when the position supports two or more specialized personnel functions or there is no specialty established.

3. *For positions requiring typing, stenographic, or data transcribing skills*

   — A parenthetical title of (*Typing*), (*Stenography*), or (*Data Transcribing*) should be added when:

   (a) The position involves typing, stenographic, or data transcribing duties, and

   (b) The need for these skills is at least as high as the level of proficiency required under the minimum competitive standard for entry-level clerk typist or clerk-stenographer, or data transcriber positions.

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— If typing, stenography, or data transcribing is infrequent or most people can accomplish the work adequately either immediately upon employment or after a reasonable period of experience on the job, a parenthetical title should not be used.

4. *For positions in this occupation which meet the criteria for titling in the Work Leader Grade-Evaluation Guide or the Supervisory Grade-Evaluation Guide*

— The word "*Lead*" is placed before the title appropriate for the work being performed.

— The word "*Supervisory*" is placed before the title appropriate for the base level of work supervised.

Note: If the base level of work for a supervisory position involves two or more kinds of personnel work, the base title should be Personnel Clerk or Personnel Assistant.

IMPACT OF AUTOMATION

Automated procedures exist in many personnel activities such as the processing of official personnel actions, maintenance of organizational and employee records, maintenance of competitor inventories used in recruitment, recording of training and management career information, and the maintenance of skills banks for promotion.

Automation impacts primarily upon clerical duties; i.e., it reduces the need to flag suspense dates, to count and tally items for recurring reports, to type personnel actions, to handpost records, etc. Instead, clerks use code forms and/or a remote control terminal to enter data into the system, which may require knowing a particular input sequence to avoid computer rejects (for example, a new position must be established in the master file before a code sheet can be processed to place an employee in the position). Generally, automation does not impact upon the personnel clerical knowledges required. Work requiring knowledge of stored data bases, program output options, systems manuals, etc., should be evaluated by the classification standard for the Computer Clerk and Assistant Series, GS-335.

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PART I

PERSONNEL CLERICAL POSITIONS

OCCUPATIONAL INFORMATION

Personnel-related clerical tasks exist in a great variety of positions. To be included in this occupation, a clerical position must require a general knowledge of the functions of other personnel-related organizational units and the relationship of work in the position with other personnel functions. Knowledges gained in such situations impact upon employees' qualifications and career potential for other personnel clerical or personnel assistant positions whether they are located in a civilian personnel office, a training center, a job information center, or an administrative support office.

Following is a description of the three basic kinds of clerical positions in this occupation—Personnel Actions Clerk, Staffing Clerk, and Personnel Clerk:

Personnel Actions Clerks

Personnel actions clerks process and document official personnel actions for a designated block of civilian positions in the Federal service. The work includes controlling master personnel records and processing accessions, separations, position and pay changes, and other personnel changes for an appointing authority. Additional duties depend upon the extent of automation in the personnel system and the depth of involvement in other personnel support work such as Federal employee benefits and recruitment/staffing.

1. *Official Personnel Actions*

   For purposes of this standard, personnel actions are grouped into four broad groups. A clerk processing a "full range" of personnel actions normally completes a number of actions in each broad group.

   Group 1 — Accessions: Gain of employees such as career-conditional, career, temporary, excepted appointments; reinstatements, transfers, and returns from furlough or LWOP.

   Group 2 — Separations: Loss of employees such as disability and voluntary retirements, resignations, removals, terminations, and extended leave without pay.

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GS-203
Part I

Group 3 — Position and Pay Changes: Movement of current employees such as reassignments, promotions, and changes to lower grade; changes in job titles, occupational codes, position numbers, or organizational data; or general pay increases, within-grade increases, merit pay increases, etc.

Group 4 — Other Changes: Miscellaneous changes which do not affect the employees' base pay or organizational data such as name changes, conversions in type of appointment, or changes in coverage of employee benefits.

Most personnel actions in the Federal service are for employees paid under the General Schedule, the General Merit Schedule, the Senior Executive System, or the Federal Wage System. Although the pay rates, the number of pay steps, and the processing of within-grade increases are different, the nature of the personnel actions and Federal employee benefits for GS, GM, SES, and wage jobs are similar. For purposes of classification, they are not considered to be significantly different "personnel systems."

In addition to processing actions for GS, GM, SES, and wage jobs, some clerks are involved with personnel systems unique to their agencies (Foreign Service, VA's Title 38, etc.) or additional jobs outside the competitive service such as consultants or experts. These responsibilities add variety from the standpoint of additional forms, different approving authorities, different action codes and regulatory authorities, additional pay systems, etc.

2. *Requests for Personnel Actions*

Personnel actions are usually initiated by operating supervisors or administrative officers and forwarded to personnel specialists in staffing, placement, classification, or employee relations. Annotations by the personnel specialists indicate to personnel actions clerks the actions to be documented.

Personnel actions clerks often consider the structure of the existing organizations and the appointment status of employees in doublechecking data on approved requests. They obtain missing data from personnel files or the appropriate office. They also question or correct wrong items. In doing this they must under-

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GS-203
Part I

stand the flow of requests from origin to completion and the functions of the various offices in relation to the requests. They work closely with other personnel units to assure accurate documentation of such items as job numbers, organizational designations, appropriation codes, regulatory authorities, and pay.

3. *Trainee Jobs*

Personnel actions clerks usually enter the occupation through promotion or reassignment from jobs in which they acquire a general knowledge of Federal personnel functions, the flow of personnel action requests, and organizational components of the installation. Trainees may have a break-in period doing work to become familiar with the records and processes of the unit, such as separating and distributing personnel actions, posting completed actions to service record cards, filing material in Official Personnel Folders (OPF), and processing less complicated personnel actions such as name changes and conversions in appointments. More frequently, they are assigned to process a full range of personnel actions for GS and/or wage positions under close supervision in an on-the-job training setting.

4. *Variations in Personnel Processing Work*

In addition to the base of work typical to this specialization, most personnel processing jobs have one or more of the following variations:

— *Automated Personnel System* - In the automation of personnel actions processing and personnel records maintenance, computers can be programmed to:

- o Edit inputs to prevent obvious errors (for example, if a position is already filled, the computer will reject a proposed action to place another employee in the same position);
- o Print official personnel actions (SF-50's or equivalent) and pay change forms;
- o Establish suspense dates such as for completion of probationary periods, conversion to career appointments, and completion of waiting periods for within-grade increases;

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- Compile and print statistical reports for personnel management purposes; and
- Update the personnel employee and organizational master file.

Personnel actions clerks determine personnel-related reasons for computer rejects and make corrections, while computer-related reasons for rejects are referred to the computer support staff.

— *Federal Employee Benefits Work* - In conjunction with processing personnel actions, clerks in this specialization participate to varying degrees in Federal employee benefits work, as follows:

- *Orientation of New Hires* - In addition to guiding the group in completion of appointment papers and the oath of office, the clerks briefly explain the Federal leave system, local facilities, and employee programs and benefits. For example, they provide health insurance brochures and basic facts about life insurance and the time periods for making application.
- *"Open Season" for Health Insurance* - Once a year, the clerk may distribute health insurance brochures to all employees with a letter advising of the opportunity to change plans or apply for a new plan. In response to questions about the differences between the many plans offered, the clerk may impartially explain the basic features of the more popular plans, but does not recommend particular plans.
- *Retirement Processing* - In response to employee requests, the clerks may explain years-of-service and age combinations required for retirement, determine creditable service and compute the service computation date for retirement, obtain data from employees' files for computation of annuities, advise how sick leave accumulation affects computations, and explain the options for health and life insurance and for redepositing retirement funds.

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GS-203
Part I

When employee benefits work described above is performed by another personnel staff member or a field/district representative, the clerks ultimately receive forms pertaining to employees in the organization served. They review the completed forms for completeness and adequacy and contact individual employees or supervisors by telephone to resolve questions before taking final processing actions.

— *Incidental Recruiting/Staffing Support Work* - Depending upon the organization of work within the personnel office, clerks may also be assigned incidental tasks normally associated with recruiting and staffing support work, such as:

- o Typing requests for Office of Personnel Management (OPM) certificates,
- o Arranging appointments for interviews of applicants,
- o Arranging appointments for physical examinations of selectees,
- o Notifying new hires by letter or telephone of the date and place to report for duty, and
- o Reviewing OPM certificates to assure observance of veterans' preference and the "rule of three" in the selection process.

Staffing Clerks

Staffing Clerks work in examining or staffing functional areas, as follows:

1. *Examining* - Clerical examining functions include:

— Dissemination of information about Federal employment opportunities and how to apply for Federal positions. Staffing clerks in centralized job information centers assist the public by explaining the kinds of examinations for which applicants may apply, the forms to use, and the procedures for applying. Tailoring information to individual needs requires asking questions regarding general and specific interests and qualifications.

— Use of established procedures to screen applications for completeness, verify eligibility for veterans' preference, convert

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raw test scores to final scores, and add points to the final score for veterans' preference.

— Maintenance of competitor inventories or registers resulting from examinations for filling jobs in a single field installation or in many agencies of a metropolitan, regional, or nationwide area. The basic types of competitor inventories are:

o Prerated — A file of eligible applicants (often referred to as a register) arranged in order of examination scores. In this setting, the staffing clerk prepares "top-of-the-register" certificates, considering such facts as veterans' preference, willingness to work in that location, number of identical requests from different agencies, and the number of times eligibles have been certified, but not selected.

o Deferred-rated — A file of screened applicants in alphabetical or identification number order; examination scores are assigned by examiners in relation to specific vacancies. The staffing clerk types names on the certificates in the numerical order provided by the examiner.

For both types of inventories, clerks maintain logs of requests for certificates, issue direct hire authorities, check (audit) returned certificates, and update the file to show actions taken on certificates and changes to applicant data. When competitor inventories are maintained by data processing equipment, the clerks establish and update files using code sheets or data transcribing machines.

2. *Staffing* - Clerks in staffing and placement functions are concerned with filling specific vacancies within their installations. Typical work includes explaining merit promotion procedures, screening "walk-ins" and explaining positions for which applications are being accepted, maintaining promotion registers and applicant supply files, arranging for the printing and distribution of job vacancy announcements, requesting certificates of eligible applicants for new appointments or conversions, reviewing applications, verifying veterans' preference, administering tests, obtaining records of previous Federal employment, arranging entry on duty dates for new hires, etc.

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GS-203
Part I

3. *Interrelationships* - A clerk in a job information center must know the general rating procedures used in various examinations, the general status of common competitor inventories, and shortage category or hard-to-fill jobs in specific agencies. The clerk in an examining unit must know who to contact in the staffing unit regarding discrepancies on requests or returned certificates and consider such information as past declination rates for the agency location in preparing certificates. The staffing clerk in recruitment must know the examining offices having jurisdiction over various examinations and the kind of information needed in requesting certificates; similar tasks include reviewing applications for completeness, determining eligibility for veterans' preference, administering tests under direct hire or delegated examining authority, and maintaining registers of eligibles for promotion.

4. *Distinctions Between Staffing Clerks and Staffing Assistants*

   — *Staffing Clerks* - Staffing clerks follow steps and procedures or apply clearly-defined requirements on the basis of facts, when regulations describe specific conditions to be met and acceptable kinds of evidence (e.g., checking dates of military service, kind of discharge, extent of disability, etc. in determining eligibility for veterans' preference and adding the proper number of points to veterans' examination scores).

   — *Staffing Assistants* - In addition to staffing clerical work described above, staffing assistants *regularly* use judgment in technical activities such as gathering information about the work of the jobs to be filled, identifying major duties, and comparing experience and training statements to qualification requirements or quality ranking factors. Examples: evaluating candidates' qualifications against narrative rating schedules and qualification factors, assisting in identifying selective and ranking factors, and explaining why candidates did not meet requirements or were not ranked in the best qualified group.

5. *Borderline Staffing Clerk/Assistant Positions* - Some employees review applications to determine eligibility for entry-level clerical jobs (e.g., GS-1 through 4) or to make qualification decisions on

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GS-203
Part I

the basis of readily discerned facts (such as substitution of a high school education for general experience or existence of typing proficiency statement). The classification of such jobs as clerk or assistant depends upon the extent of judgment or analysis required, existing career patterns, and whether the work is performed on a regular and recurring basis. Part II of this standard may be helpful in resolving borderline situations.

Personnel Clerks

Personnel clerks work in support of one or more specialized personnel activities. There are two basic types of personnel clerk positions:

1. The first type of clerk is assigned *a segment of the clerical work in a unit*; e.g., Federal employee benefits processing.

   — The clerk explains options under existing regulations or procedures and examines steps or forms supporting a proposed transaction: Have necessary steps been followed in routing or coding? Are necessary documents present? Do they appear to be complete? Is the content or subject matter of the document correct? Do individual items within each document meet applicable conditions or specified requirements? Are codes compatible with actions being processed?

2. The second type of clerk provides clerical support for a full range of work *in a personnel specialty area.* Some procedural and substantive processing is performed on a continuing basis, for example:

   — In an employee development unit, reviewing training requests for completeness, coding training data, and maintaining records of monies spent for various kinds of training and career development;

   — In a classification unit, reviewing personnel action requests for correctness of position numbers and organizational data, authorizing identical-additional (IA) positions when the record clearly shows that additional positions may be established, and determining competitive levels by referring to a listing; or

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— In a labor relations unit, processing dues deductions and requests for allotment changes.

This clerk is aware of the work of staff members in the particular specialty and provides clerical support for them for the purpose of increasing the effectiveness of the unit as a whole by:

— Answering general questions and completing forms or procedures pertinent to the specialty,

— Maintaining personnel subject-matter files,

— Arranging space for meetings,

— Arranging for printing services,

— Following up on overdue reports,

— Abstracting material from files and preparing recurring reports, and

— Performing related office support work.

These personnel clerk positions are distinguished from secretarial positions by the need for knowledge of the operations and terminology of the personnel specialty. At the full performance level, these knowledges serve as a basis for promotion within the GS-203 series, retention, or other similar personnel management considerations.

GRADING OF PERSONNEL CLERICAL POSITIONS

Nonsupervisory personnel clerical work is to be evaluated on a factor-by-factor basis by reference to the appropriate OPM Benchmarks and Factor-Level Descriptions for personnel clerical positions in Part I. Should a factor related to the job being evaluated appear to exceed the highest level for a factor described in Part I, users may refer to the Primary Standard in accordance with instructions found in the introductory material for the Factor Evaluation System.

The Work Leader Grade-Evaluation Guide is to be used for positions which meet the criteria for classification as work leaders.

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GS-203
Part I

The Supervisory Grade-Evaluation Guide is to be used for positions which meet the minimum criteria for evaluation as supervisors.

GRADE CONVERSION TABLE

Total points on all factors are converted to GS grades as follows:

Grade	*Point Range*
2	255-450
3	455-650
4	655-850
5	855-1100
6	1105-1350
7	1355-1600

FACTOR LEVEL DESCRIPTIONS FOR PERSONNEL CLERICAL POSITIONS

FACTOR 1, KNOWLEDGE REQUIRED BY THE POSITION

Factor 1 measures the nature and extent of information or facts which the clerk must understand to do acceptable work (e.g., steps, procedures, practices, rules, policies, regulations, and principles) and the nature and extent of the skills needed to apply those knowledges. To be used as a basis for selecting a level under this factor, a knowledge must be required and applied.

Level 1-1 — 50 points

Jobs requiring this level of knowledge are in a personnel clerk career ladder or upward mobility program; the work typically involves simple, repetitive personnel tasks. Examples:

— Knowledge of general functions of the personnel office to refer visitors to the proper unit, e.g, union problems to the labor relations unit, or applicants to the employment office.

— Knowledge of the most frequently used personnel forms to route incoming mail, such as training requests, position descriptions, employment applications, OPM certificates, and personnel action requests, to the proper personnel units.

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— Knowledge of personnel recordkeeping procedures to perform tasks such as logging personnel action requests, assigning control numbers, filing and retrieving official personnel folders, preparing new official personnel folders, and preparing alphabetized rosters of classes or seminars.

— Knowledge of the operating organizations served to route mail such as official personnel actions, approved training requests, or classification survey reports to the proper office, or to count out the proper number of employee publications needed for each organizational segment.

Level 1-2 — 200 points

Knowledge of commonly used personnel forms and procedures or basic knowledge of local personnel activities to perform routine clerical tasks. Examples:

— Knowledge of activities of the unit to which assigned to provide limited information such as training courses scheduled or pending actions.

— Knowledge of a few commonly used personnel forms to determine the appropriate form for a particular purpose or to complete forms with facts (name, Social Security number, date of birth, organization, etc.); for example, to:

- o Designate beneficiary, withhold State and Federal taxes, have bonds deducted from pay, and have pay check sent to home or bank;
- o Request official personnel records from records center or transfer inactive records;
- o Initiate personnel action requests on basis of information provided;
- o Request OPM certificates of eligibles; or
- o Code personnel data for computer processing.

— Knowledge of personnel forms used routinely in the unit to which assigned to correct obvious errors or omissions and/or to obtain

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missing information from the originator such as signatures, identification data, effective dates, organization or budget codes, etc.

— Knowledge of personnel recordkeeping procedures to maintain files of personnel regulations, directives, and references; and/or to maintain master employee records or organization files; for example, to:

- o File master copies of position descriptions by organization; remove inactive descriptions;
- o Post completed actions to service record cards;
- o File office copies of publications by personnel subject and occupational or other codes;
- o File training material by course title and date;
- o File register cards by job category, grade, and numerical rating; update cards to show changes, actions on certificates, etc.; or
- o Establish and follow up on recurring suspense dates for reports, requests for review of employee suggestions, completion of waiting periods, etc.

— Knowledge of the operating organizations served to refer candidates to the appropriate interviewing supervisor or to coordinate routine personnel matters such as notifying employees of approved training, dates for panel meetings, etc.

— Knowledge of personnel processing procedures to effect limited kinds of personnel actions such as:

- o Noncomplicated actions (e.g., name changes and appointment conversions) which do not involve position, organizational, or pay changes; or
- o Within-grade increases which are processed repetitively.

Level 1-3 — 350 points

Knowledge of a body of standardized personnel rules, procedures, or requirements to perform or explain a range of clerical procedures in support of one or more personnel specialty or program areas and to resolve recurring problems. Examples:

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GS-203
Part I

— Knowledge of procedures, requirements, and terminology related to employee development activities to process training requests and training contracts; maintain records of monies spent for various kinds of training; compile periodic training reports; obtain visual aid equipment, printing services, and training facilities; maintain career development files and records of training; provide general information about the courses available, dates to be held, etc.

— Knowledge of procedures, requirements, and terminology related to classification activities to screen personnel action requests and determine which need to be referred to classifiers for action; make routine determinations such as authorization of identical additional positions, prepare listings for cyclic classification reviews and follow up on overdue reports; determine completeness of classification survey package; compile production reports; draw organization charts based on information from classifier; reconcile organizational records with master personnel files; maintain files of active PD's by organization; control assignment of position numbers; file classification and grading standards by occupational codes; and provide basic information about the classification program.

— Knowledge of procedures, requirements, and terminology related to labor relations activities to maintain records concerning grievances (status, actions, dates); arrange for arbitration hearings (request list of arbitrators, confirm selection with union, coordinate arrangements for facilities, notify participants, pull pertinent background material together); arrange for proofreading, printing, and distribution of union contracts; process dues deductions and union requests for allotment changes; maintain subject-matter files of contracts, negotiations, grievances, and unfair labor practices; and provide basic information about the labor relations program.

— Knowledge of procedures, requirements, and terminology related to recruitment and staffing activities to explain merit promotion procedures, procedures for reinstatement or transfer to another Federal agency, and job vacancies for which applications are being

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accepted; coordinate arrangements for promotion panels; compile production reports; and perform a range of clerical procedures such as determining the number of eligibles to certify for vacancies, identifying interested eligibles and arranging in rank order by examination scores and veterans preference, or administering written tests according to specific procedures.

— Knowledge of a body of standard procedures for Federal employee benefits to perform a range of clerical duties such as: explaining the basic features of plans and time limits for filing for health insurance; completing forms to process a variety of actions or changes in health insurance benefits at employee's request; explaining the amount and cost of regular and optional Federal life insurance; assisting employee in completing requests for insurance and designations of beneficiaries; determining whether conditions are met for reinstatement of insurance; explaining conversion of life insurance to separating employees; explaining the basic features of the Federal retirement program and established options such as survivor's benefits and opportunity to pay back previous refunds; computing service computation date (SCD) for retirement and estimating annuities by feeding prescribed data into computer; and completing forms to accomplish routine retirement actions.

— Knowledge of personnel processing language, procedures, and options available to process a full range of recurring types of official personnel actions, for example: a variety of accessions (reinstatements, conversions, career-conditional, career, temporary, and limited appointments), separations, position and pay changes, and miscellaneous changes for positions in the competitive service with a few excepted appointments for special programs such as the handicapped, veterans, and student aids (summer employment). Positions may be in one or more pay schedules; e.g., FWS, GS, and GM.

Additional examples of clerical knowledges at this level are shown in the comparison of Levels 1-3 and 1-4 in Part II.

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Level 1-4 — 550 points

Knowledge of an extensive body of personnel rules, procedures or operations to perform a wide variety of interrelated or nonstandard personnel clerical work and resolve a wide range of problems.

In addition to the body of clerical knowledges required at the next lower level, knowledge of locally established program objectives, priorities, and practices requiring extended experience to initiate, plan, and coordinate a series of interrelated clerical activities to meet the needs of varying circumstances. Examples:

— A clerk serving and providing clerical support for a classification unit which requires knowledge of staff assignments, commitments, deadlines, operating policies and priorities of the unit, etc., to coordinate the clerical workload and resolve a wide range of problems.

— A clerk performing a segment of the staffing clerical work which requires knowledge of recruitment sources and probabilities of candidates being available; alternative staffing regulations, processes, and related documentation requirements; and locally established staffing priorities and practices in conjunction with a variety of interrelated clerical activities to fill recurring vacancies by reinstatement, appointment, or promotion.

— A clerk regularly processing a variety of unique official personnel actions such as assignments or details to State governments, foreign countries, or international organizations; a variety of special appointments and programs such as consultants, visiting program for scientists, associates, fellows, residents, and the Cooperative Education Program; or significant numbers of positions (e.g., 25% or more) filled by employees in the excepted service under a personnel system unique to the agency, e.g., the Foreign Service. Problems encountered at this level vary depending upon individual circumstances; for example: answering requests for retroactive personnel actions which require tracing employee's history and applying pertinent technical references, conditions, or precedents; arranging for overseas transfers which require obtaining budget, travel, security, and related clearances

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GS-203
Part I

locally and, as required, from headquarters; and processing conversions between personnel systems such as from the Commissioned Corps to the General Schedule and vice versa. In addition to a wide variety in the kinds of appointments, pay treatments, regulatory authorities, approvals and support documents, and interrelated aspects of processing personnel actions, there may be a variety of duty stations, positions subject to foreign compensation, and frequent transfers of functions.

NOTE: In personnel specialty areas such as classification, employee development, labor relations, and staffing, the normal progression at this point in a career ladder may involve practical knowledges to do limited technical work described in Part II, "Personnel Assistant Positions." If the knowledge factor appears to meet Level 1-4 of Part II, the work should be reviewed to determine if it constitutes an assistant position appropriately evaluated by Part II.

FACTOR 2, SUPERVISORY CONTROLS

"Supervisory Controls" covers the nature and extent of direct and indirect controls exercised by the supervisor, the clerk's responsibility, and the review of completed work. The supervisor controls work in the way assignments are made, instructions are given, priorities and deadlines are set, and objectives and boundaries are defined. Responsibility of the clerk depends upon the extent to which the clerk is expected to develop the sequence and timing of various aspects of the work, to modify or recommend modification of instructions, and to participate in establishing priorities and defining objectives. The degree of review of completed work depends upon the nature and extent of the review, e.g., close and detailed review of each phase of the assignment, detailed review of the finished assignment, spot check of finished work for accuracy, or review only for adherence to policy.

Level 2-1 — 25 points

Typically a higher grade clerk or supervisor in the unit gives specific and detailed instructions regarding assigned tasks and is readily available to provide additional guidance or assistance.

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The employee works as instructed and consults with the supervisor, as needed, on matters not specifically covered by the original instructions.

The supervisor maintains close control over the work by checking progress and reviewing completed work for accuracy, adequacy, and adherence to instructions.

Level 2-2 — 125 points

The supervisor provides a continuing assignment, initially indicating what is to be done, quantity expected, deadlines, and priority of work. The supervisor provides additional, specific instructions for new, difficult, or special projects, including suggested work methods or advice on the availability of source materials.

The clerk uses initiative in carrying out recurring assignments using established procedures and standard methods of operation. This includes obtaining missing information from the originators of forms or documents or correcting recurring kinds of discrepancies in factual data (e.g., discrepancies between computer printouts and input data). The clerk contacts the supervisor for assistance when established rules or practices do not appear to apply, such as difficulty in obtaining data to meet processing deadlines or questions which cannot be answered by standard responses.

The supervisor assures that finished work is accurate and in compliance with instructions. Work products such as periodic reports, data assembled, and certificates prepared are usually reviewed for conformance to instructions and spot checked for accuracy. Actions involving changes in employee pay are usually reviewed in more detail for accuracy.

NOTE: At Level 2-2, some clerks work more independently than others because, over a period of time, they have developed a knowledge of program objectives, alternatives, local priorities, and operating policies which influence how the clerical work is done and the kind of adaptations or exceptions which can be made. (See Factor 1, Knowledge Required by the Position.) Although these clerks are able to carry out recurring assignments with less frequency supervisory consultation and receive specific instructions for only special

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GS-203
Part I

or new projects and reports, the supervisor controls the tasks to be done; the quantity, quality, and deadline criteria to be met; and the specific procedures and work methods to use in accomplishing the work. Deviations from these "standing orders" must be approved by the supervisor.

FACTOR 3, GUIDELINES

This factor covers the nature of guidelines and the judgment needed to apply them. Clerks in this occupation use guides such as work samples and desk manuals; local policies and practices; instructions regarding personnel forms or written test materials; pamphlets pertaining to Federal personnel programs, health insurance brochures, training course announcements, merit promotion plans, and job vacancy and examination announcements; and references such as Federal Personnel Manual issuances pertinent to the program to which assigned, OPM examining manuals, coding manuals, and agency directives.

Individual jobs vary in the specificity, applicability, and availability of the guidelines for performing assignments. Consequently, the constraints and judgmental demands placed upon clerks also vary. For example, the existence of specific instructions, procedures, and policies may limit the opportunity of the clerk to make or recommend decisions or actions. However, clerks may use considerable judgment in applying generally stated policies or objectives to individual situations.

Level 3-1 — 25 points

Written guidelines exist, but may be presented to the clerk orally or with a few specific work samples and explanation of office policies.

The clerk works according to the guidelines and refers problems to a higher grade member of the staff.

AND/OR

Specific written guidelines (such as instructions for administering a written test) are provided. No deviations are permitted.

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Level 3-2 — 125 points

Guidelines are available such as work samples, instructions on personnel forms being processed, health benefits brochures, job vacancy or training course announcements, merit promotion plans, Federal Personnel Manual issuances, agency directives, technical manuals, and local policies, as appropriate to the unit to which assigned.

The clerk selects the proper guidelines according to circumstances of the specific case. This may include determining which of several alternatives to use. Situations to which existing guidelines cannot be applied or significant proposed deviations are referred to a higher grade member of the staff.

FACTOR 4, COMPLEXITY

This factor covers the nature, number, variety, and intricacy of tasks, steps, processes, or methods in the work performed; the difficulty in identifying what needs to be done; and the difficulty and originality involved in performing the work.

Level 4-1 — 25 points

The work consists of a few clear-cut tasks. Examples:

— Separating and distributing completed copies of official personnel actions, establishing and maintaining official personnel folders, and posting service record cards.

— Maintaining established files for a personnel unit, routing mail, and referring telephone calls and visitors.

There is little choice in deciding what needs to be done; e.g., missing information is obtained from the originators of the documents reviewed, or serial numbers are assigned in numerical sequence.

Actions to be taken are readily recognized; e.g., the employee copy of an official personnel action is sent to the organization shown on the action; or the service record card to be posted is filed under the same organization.

BEST COPY AVAILABLE

GS-203
Part I

Level 4-2 — 75 points

The work consists of various related steps, processes, or methods in a personnel function, such as:

— Maintaining one or more registers of eligibles by screening applications for completeness; preparing notices of rating, register cards, cross-reference cards, or code sheets for computer maintenance of the register; selecting candidates to certify; auditing returned certificates; and updating registers to show action on the certificate.

— Performing a range of varied office clerical tasks in support of a personnel specialty, including subject-matter procedures, preparation of recurring reports from information in the files, screening of mail and visitors, completion of room arrangements for seminars and panel meetings, etc.

Decisions regarding what needs to be done involve various choices requiring the clerk to recognize the existence of and differences among clearly recognizable situations. For example, in auditing a returned certificate, the clerk determines that an action code is shown for each listed eligible, that the veterans' preference requirements and "rule of three" have been observed, that applications for selected candidates have been retained, and that dates of entrance on duty are shown. If there is a discrepancy or omission, it is called to the appointing officer's attention for correction. If there is a question regarding a candidate's interest in being considered further, an inquiry may be made to the candidate. If everything is in order, related cards or automated files are posted accordingly.

Actions or responses differ in factual ways depending upon the variety of organizations served, the variety of positions filled, and similar factors.

Level 4-3 — 150 points

The work consists of different and unrelated processes and methods such as is normally required for a full range of official personnel actions (accessions, separations, pay changes, and Federal employee benefits) for a block of assigned organizations.

BEST COPY AVAILABLE

GS-203
Part I

Decisions regarding what needs to be done involve many considerations in a variety of different situations which require different processing treatment. For example, in processing personnel actions, a clerk needs to determine the kind of action being processed, whether a position is established and within authorized ceiling, whether a new appointee has previous Federal service, whether the periods of prior service are creditable, whether the employee is eligible for Federal benefits, whether the probationary period was previously completed, whether the position to which the employee is assigned is obligated, whether special security clearances are needed, the nature of the appointment and work schedule (full-time, part-time, intermittent), whether documentation is attached to the action, and similar considerations depending upon the nature of and basis for the action and the appointment status of the employee. The actions require examination of employee data such as previous work history, military service, previous leave without pay, or education; e.g., in determining substantially continuous creditable service for appointment conversion. Regulations cited and nature of action used are reviewed for compatibility with the purpose of the personnel action. Master personnel records are reconciled; i.e., against computer files and/or against records maintained by the organization served.

Official personnel actions pertain to interrelated aspects of employment and involve additional procedures for different personnel purposes such as security investigations, payroll deductions, health insurance, life insurance, retirement, unemployment compensation, medical records, license renewals, etc.

FACTOR 5. SCOPE AND EFFECT

"Scope and Effect" covers the relationship between the nature of the work; i.e., the purpose, breadth, and depth of the assignment, and the effect of work products or services both within and outside the organization.

For clerks in this occupation, effect measures such things as whether the work output facilitates the work of others, contributes to timely personnel services, or affects the adequacy of systems of clerical and administrative support. Effect alone does not provide

BEST COPY AVAILABLE

GS-203
Part I

sufficient information to properly understand and evaluate the impact of the position. The scope of the work completes the picture, allowing consistent evaluations. Only the effect of properly performed work is considered.

Level 5-1 — 25 points

The purpose of the work is to perform limited, repetitive, or closely related tasks such as filing and completing forms.

The work saves time of other members of the staff or contributes to the efficiency of the unit, but has little impact beyond the office to which assigned.

Level 5-2 — 75 points

The purpose of the work is to apply or explain personnel rules, practices, or procedures in performing an assigned block of clerical work or in serving as the principal clerk for a unit.

The work product or service usually affects the accuracy and reliability of further processes; e.g., explanations to job applicants result in their being considered further for employment or promotion, correction of discrepancies on personnel action requests affects the accuracy of personnel actions; processing of official personnel actions affects the accuracy of payrolls. Examples:

— Clerical procedures in support of an incentive awards program involve applying local requirements for processing submissions, obtaining supervisory evaluations, and preparing statistical reports.

  The completeness of submissions and supporting documents affects the ability of the Incentive Awards Committee to make adequate evaluations and the efficiency of their operations. Statistical reports are used by specialists in promoting the program.

— Clerical procedures in support of an employee development unit involve following established procedures for screening training requests, controlling training and career development funds, and providing information regarding the availability of specific courses, numbers of employees completing training, or how to prepare training requests.

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The work improves the overall efficiency of the unit and the accuracy and reliability of training reports and training vendors' bills.

— The personnel actions clerk follows specific processing procedures as appropriate under various conditions and requirements.

Official personnel actions are used by the payroll office in computing payment of wages and serve as reliable sources in controlling ceiling and in developing personnel reports.

FACTOR 6, PERSONAL CONTACTS

This factor includes face-to-face and telephone contacts with persons not in the supervisory chain. (NOTE: Personal contacts with supervisors are covered under Factor 2, Supervisory Controls.) Levels described under this factor are based on what is required to make initial contact, the difficulty of communicating with those contacted, and the setting in which the contact takes place (e.g., the degree to which the employee and those contacted recognize their relative roles and authorities).

Above the lowest level, points should be credited under this factor only for contacts which are essential for successful performance of the work and which have a demonstrable impact on the difficulty and responsibility of the work performed.

The relationship between Factors 6 and 7 presumes that the same contacts will be evaluated for both factors. Therefore, use the personal contacts which serve as the basis for the level selected for Factor 7 as the basis for selecting a level for Factor 6.

Level 6-1 — 10 points

Personal contacts are with employees within the office to which assigned and units involved in related functions, such as the payroll office and the computer support staff.

AND/OR

Contacts are with the general public in very highly structured situations such as with:

BEST COPY AVAILABLE

GS-203
Part I

— Applicants taking employment tests when assisting a test administrator by observing that instructions are followed, or

— Trainees in a class (when relaying messages to students).

Level 6-2 — 25 points

Personal contacts are generally with all levels of employees, supervisors, union representatives, and administrative staffs in the organization served or in support facilities located in the same geographic area or in regional, district, or field offices.

AND/OR

Contacts are with members of the general public from all walks of life in a moderately structured setting; e.g., with applicants inquiring about Federal job opportunities; landlords, creditors, and investigators inquiring about employees; agency representatives coordinating transfer of Federal employees; former employees; relatives of employees; training vendors; union or grievance arbitrators; health insurance carriers; or school officials.

FACTOR 7, PURPOSE OF CONTACTS

In this occupation, purpose of personal contacts may range from factual exchanges of information to resolving problems affecting the efficiency of personnel operations. The personal contacts which serve as the basis for the level selected for this factor must be the same as the contacts which are the basis for the level selected for Factor 6.

Level 7-1 — 20 points

In personal contacts, the clerk obtains, clarifies, or gives facts or information directly related to the work. For example, depending upon the work situation, the clerk does one or more of the following:

— Explains leave accrual system for sick and annual leave,

— Answers general questions about health and life insurance,

— Tells where to file applications for specific jobs,

— Provides instructions for completing personnel forms,

— Explains when pay periods and pay days are,

BEST COPY AVAILABLE

GS-203
Part I

— Provides due date for within-grade increase,

— Verifies employment,

— Confirms training nominations,

— Provides information about the status of pending actions, the dates and places of meetings, etc.

Level 7-2 — 50 points

At this level, clerks regularly initiate personal contacts and follow through on work efforts to resolve minor problems or obtain cooperation of others, such as one or more of the following:

— Following up on overdue materials and obtaining cooperation of others in submission of panel reports, comments on suggestions, certifications for within-grade increases, or documentation required to process new appointments;

— Resolving or clarifying factual discrepancies in personnel or organizational designations or codes submitted by the organizations served;

— Resolving processing problems involving pay of employees such as no pay check, no deductions for health benefits, or promotion not processed;

— Arranging for scheduled conferences, hearings, or training classes by anticipating needs and obtaining appropriate space, printing of handouts, procurement of equipment, seating arrangements, security clearances for visitors, etc; and

— Coordinating and adjusting interview schedules with applicants and supervisors, checking with previous employers about performance and suitability, and arranging for suitable release dates from current employers.

On occasion considerable tact, patience, and skill may be required in approaching or responding to irate or uninformed individuals.

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FACTOR 8, PHYSICAL DEMANDS

The "Physical Demands" factor covers the requirements and physical demands placed on the employee by the work assignment. This includes physical characteristics and abilities (e.g., specific agility and dexterity requirements) and the physical exertion involved in the work (e.g., climbing, lifting, pushing, balancing, stooping, kneeling, crouching, crawling, or reaching). To some extent, the frequency or intensity of physical exertion must also be considered; e.g., a job requiring intermittent physical effort.

NOTE: Regulations governing pay for irregular or intermittent duty involving unusual physical hardship or hazard are in Chapter 550, Federal Personnel Manual.

Level 8-1 — 5 points

No special physical demands are required. The work is primarily performed while sitting. However, some movement may be needed to obtain records from file drawers in the office, to visit offices in the building, or to drive an automobile to other locations.

Level 8-2 — 20 points

The work requires long periods of continual standing at a counter, with frequent movement to obtain forms from another location and return to the counter.

FACTOR 9, WORK ENVIRONMENT

This factor considers the risks and discomforts in the employee's physical surroundings or the nature of the work assigned and the safety regulations required. Although the use of safety precautions can practically eliminate a certain danger or discomfort, such situations typically place additional demands upon the employee in carrying out safety regulations and techniques.

NOTE: Regulations governing pay for irregular or intermittent duty involving unusual physical hardship or hazard are in Chapter 550, *Federal Personnel Manual.*

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Level 9-1 — 5 points

The work environment involves everyday risks or discomforts which require normal safety precautions typical of such places as offices, meeting and training rooms, libraries, residences, or commercial vehicles; e.g., use of safe work practices with office equipment, avoidance of trips and falls, or observance of fire regulations and traffic signals. The work area is adequately lighted, heated, and ventilated.

BEST COPY AVAILABLE

Series	Grade	BMK #
GS-203	03	01

OPM Benchmark Description

STAFFING CLERK (TYPING)

Duties

Performs related clerical tasks in support of a recruitment and placement unit.

— Answers telephone for the unit and provides general information about job vacancies, promotion announcements, and outstanding certificates. Refers calls about specific vacancies or actions to a higher grade employee.

— Maintains log of pending personnel action requests. Completes "vacancy record" from information shown on personnel action requests to register vacancies with agency priority placement program.

— Compiles and maintains a list of current vacancies and periodically prepares reports for inclusion of installation vacancies in agency listing. Registers employees in overseas recruiting program, as requested.

— Requests certificates of eligibles from the appropriate examining office or agency career referral office. Furnishes applications for rating with name requests of applicants recruited under direct-hire authority. As requested, fills out inquiry forms or contacts applicants by telephone to determine their availability for employment; arranges for employment interviews; or contacts examining offices to expedite requests, extend due dates, and request supplemental referrals. Annotates certificates being returned to show action(s) taken.

— Maintains files of Federal examination announcements. Obtains additional copies upon request.

— Maintains applicant supply file.

— Types narrative reports, letters, memorandums, and telegrams.

Factor 1, Knowledge Required by the Position — Level 1-2 — 200 points

— Knowledge of commonly-used recruitment forms and procedures to obtain certificates of eligibles and priority placement referrals,

BEST COPY AVAILABLE

Series	Grade	BMK #
GS-203	03	01

to maintain listing of vacancies, and to maintain the applicant supply file.

— Skill as a qualified typist to type reports, letters, memorandums, telegrams, recruitment forms, and vacancy listings.

Factor 2, Supervisory Controls — Level 2-2 — 125 points

The supervisor provides the continuing assignment which includes specific tasks to be performed, establishes deadlines and priorities, explains changes in policies or new procedures, and is available to assist with problems.

The clerk uses initiative in following established procedures and priorities in completing the daily work.

Telephone and personal contacts are not reviewed as long as those receiving the service are satisfied. Requests and correspondence are spot checked when being signed. The supervisor assures that applicants on certificates are contacted without undue delays and that priority attention is given to actions for hard-to-fill positions.

Factor 3, Guidelines — Level 3-1 — 25 points

Guidelines are in job vacancy announcements, Federal examination announcements, agency instructions, directions on forms to be completed, office policies, and correspondence manuals.

The proper guideline is readily determined, and few deviations are made.

Factor 4, Complexity — Level 4-2 — 75 points

The employee performs a variety of related receptionist and clerical tasks in support of a recruitment and placement unit.

Determines the appropriate office from which to obtain listings of candidates. Determines the availability of candidates and takes action to arrange for interviews. Arranges for expediting delivery of certificates, follows up on overdue certificates, and requests time extensions or supplemental referrals, as necessary.

Actions taken differ according to the type of positions to be filled, the recruitment source, and other factual data.

BEST COPY AVAILABLE

Series	Grade	BMK #
GS-203	03	01

Factor 5, Scope and Effect — Level 5-1 — 25 points

The clerk performs related procedures in maintaining the applicant supply file, compiling lists of active vacancies, requesting and returning certificates.

The work saves time of other staff members and contributes to the efficiency of the office.

Factor 6, Personal Contacts — Level 6-2 — 25 points

Personal contacts are with employees and supervisors, applicants, and representatives of headquarters and examining offices.

Factor 7, Purpose of Contacts — Level 7-1 — 20 points

Contacts are for the purpose of obtaining or giving facts, making appointments, following up on outstanding certificates, or referring visitors and callers to the appropriate staff member.

Factor 8, Physical Demands — Level 8-1 — 5 points

Performs normal office activity such as moving around the office and obtaining files.

Factor 9, Work Environment — Level 9-1 — 5 points

The work is performed in a pleasant, but crowded office setting.

TOTAL POINTS — 505

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OPM Benchmark Description

Series	Grade	BMK #
GS-203	04	01

STAFFING CLERK (TYPING)

Duties

Performs a variety of clerical tasks related to the merit promotion program.

— Types vacancy announcements; arranges for printing and distributes copies according to the area of consideration. Prepares file folders.

— Prepares register cards and establishes registers; types rating notices; and maintains count of the number of promotion eligibles by grade on each register. For a large register, such as Clerk-Typist, sorts by employee willingness to work in various tenant organizations. Retires files according to requirements.

— Identifies eligibles for promotion certificate according to local merit promotion policy; obtains new supervisory appraisals as appropriate; follows up on overdue appraisals or questionnaires; types certificate; and attaches employee records.

— Updates register cards on the basis of information on returned certificates; prepares nonselection notices; and files certificate with supporting data.

— Answers questions regarding vacancies being filled, procedures for applying under the promotion plan, the current status of individuals on the register, the status of promotion actions and promotion registers, etc. Provides extra forms as requested.

— Reviews employee requests for transfer (lateral) for completeness and files in proper folder.

— Types rating schedules, letters, and reports from handwritten notes.

— Establishes and maintains files of correspondence, applications, performance appraisals, and promotion folders. Maintains subject-matter manuals.

Factor 1, Knowledge Required by the Position — Level 1-3 — 350 points

— Knowledge of a body of standard procedures and requirements

BEST COPY AVAILABLE

Series	Grade	BMK #
GS-203	04	01

relating to the local merit promotion plan to identify eligibles for certification, determine area of consideration, maintain promotion registers, advise employees of their rankings, and provide general information such as time limits for filing, or requirements regarding supervisory appraisals.

— Skill as a qualified typist to type correspondence, reports, rating schedules, job vacancy announcements, and certificates in a timely manner.

Factor 2, Supervisory Controls — Level 2-2 — 125 points

The supervisor provides the continuing assignment regarding specific tasks to be performed, establishes deadlines and priorities, explains changes in policies or new procedures, and is available to assist with problems.

The clerk follows established procedures and priorities in completing the daily work. Refers technical matters to a higher grade employee; e.g., when employee questions the accuracy of a rating for promotion.

Telephone contacts with employees and supervisors are not reviewed so long as those receiving the service are satisfied. New certificates are reviewed for technical accuracy. Maintenance of files is subject to spot check.

Factor 3, Guidelines — Level 3-1 — 25 points

Guidelines for carrying out the work are in the local merit promotion plan, directions on forms to be completed, office policies, and correspondence manuals.

Most of the guidelines are memorized; there is little opportunity to deviate from procedures described in the merit promotion plan.

Factor 4, Complexity — Level 4-2 — 75 points

The employee performs a variety of clerical tasks in support of a merit promotion program.

Determines the number of vacancy announcements needed for the area of consideration. Identifies eligibles for promotion certificates

BEST COPY AVAILABLE

Series	Grade	BMK #
GS-203	04	01

considering the number available, willingness to work in the tenant organization where the vacancy exists, highly qualified versus qualified, and the number of tied ratings. Determines the nature of actions needed to update register and employee data on the basis of returned, approved certificates.

Actions taken differ according to the type and grade level of the job being filled, the location of the vacancy, the number of highly qualified candidates, dates of most recent appraisals, and similar factual data.

Factor 5, Scope and Effect — Level 5-2 — 75 points

The clerk follows procedures for identifying and certifying eligible employees from a promotion register, and for arranging for the printing and distribution of vacancy announcements.

The promotion register is relied upon as being accurate. Certificates are used by operating offices in filling positions through merit promotion. The work of the clerk enhances the efficiency of the employment unit.

Factor 6, Personal Contacts — Level 6-2 — 25 points

Personal contacts are with employees, administrative officers and clerks, operating supervisors, and co-workers.

Factor 7, Purpose of Contacts — Level 7-1 — 20 points

The purpose of the contacts is to provide information such as the status of a register by grade level or actions being processed; to request supervisory appraisals or supplemental questionnaires; and to answer general questions about merit promotion procedures and opportunities of individual employees for promotion referral. Employees who are dissatisfied because of nonselection, their rankings on promotion registers, or uncontrollable processing delays are referred to a higher grade employee.

Factor 8, Physical Demands — Level 8-1 — 5 points

Performs normal office activity such as moving around the office and obtaining files.

BEST COPY AVAILABLE

Series	Grade	BMK #
GS-203	04	01

Factor 9, Work Environment — Level 9-1 — 5 points

The work is performed in a pleasant office setting.

TOTAL POINTS — 705

BEST COPY AVAILABLE

OPM Benchmark Description

Series	Grade	BMK #
GS-203	04	02

STAFFING CLERK

Duties

In an examining office, screens and processes applications for entry-level positions, GS-2 and GS-3, in several occupations.

— Reviews applications for completeness and adequacy. Refers medical and suitability questions to the review desk. Makes notes for typist to request missing data.

— Reviews printouts of employment test scores; as necessary, refers to a table to convert raw scores to a scale of 100.

— Compares experience and training statements against minimum qualification requirements for each grade covered by the examination:

- o Stenographers, Typists, and Data Transcribers, GS-2 and GS-3;
- o Sales Store Checker, GS-3; and
- o Nursing Assistant, GS-2 and 3.

— Determines that necessary documents (self-certifications, proficiency statements, or veterans, preference forms) are attached. Assigns final rating for each option and grade.

— Processes requests for reconsideration of examination rating by rerating based on current information.

— When notified by agency that applicant did not pass the typing test, suspends eligibility and notifies the applicant. If applicant passes the test, but is not selected, deletes the self-certification annotation on the inventory file.

— Adjusts records to extend eligibilities beyond 12 months, as requested.

— Answers questions by telephone, correspondence, and form letter; such as the number of right answers needed to be rated eligible on the test, the number of available eligibles, relative position (rank order) on the prerated inventory, how to be rated eligible for a higher grade, and why eligibility was suspended.

BEST COPY AVAILABLE

Series	Grade	BMK #
GS-203	04	02

Factor 1, Knowledge Required by the Position — Level 1-3 — 350 points

Knowledge of a body of standardized examining procedures which includes:

— Knowledge of basic evaluation techniques to screen applications on minimum eligibility for GS-2 and GS-3 positions in several occupations.

— Knowledge of examining procedures, requirements, and regulations to make appropriate changes in records of a prerated inventory, to explain a current rating, and to explain how to be rated for a higher grade.

Factor 2, Supervisory Controls — Level 2-2 — 125 points

The supervisor provides the continuing assignment regarding specific tasks to be performed, establishes deadlines, and priorities, and explains changes in policies or new procedures.

The clerk uses initiative in following established procedures in completing repetitive work. Deviations, problems, and unfamiliar situations are referred to the supervisor.

The supervisor spot checks rated applications and reviews correspondence to be sure they are technically accurate and in accordance with instructions.

Factor 3, Guidelines — Level 3-2 — 125 points

Uses a few qualification standards for GS-2 and GS-3, examination announcements, agency examining instructions, and local guides.

Duties of jobs are described in the examination announcements in general terms that apply to a broad number of positions. The nature of the work is readily understood. Application of the qualification requirements involve a few alternatives which are memorized; e.g., substitution of a high school education for six months of clerical experience, self-certification of typing versus passing a performance test.

BEST COPY AVAILABLE

Series	Grade	BMK #
GS-203	04	02

Factor 4, Complexity — Level 4-2 — 75 points

Performs related tasks in evaluating and processing applications for GS-2 and GS-3 positions in several occupations.

Determines the completeness and adequacy of applications. Ascertains eligibility on written test; converts raw scores. Screens experience/training statements for minimum qualifications involving basic skills. Determines veterans' preference and the final examination rating to be assigned for each option and grade. Determines adjusted ratings as required (self-certified typist applicant that did not pass agency typing test or reconsideration of examination rating based on new data).

Backgrounds of applicants who pass the written test are compared to basic qualifications. Experience is evaluated as generally related, directly related, or not creditable; substitutions of education for experience are recurring. Actions to be taken are readily discerned from facts on job applications and the examination requirements.

Factor 5, Scope and Effect — Level 5-2 — 75 points

Performs specific procedures in screening and processing applications of people who have passed written tests in several employment examinations.

The applications are placed in a competitor inventory for the filling of agency requests for certificates of eligibles.

Factor 6, Personal Contacts — Level 6-2 — 25 points

Personal contacts are with applicants and their representatives, agency personnel representatives, co-workers, and the computer test records center.

Factor 7, Purpose of Contacts — Level 7-1 — 20 points

The purpose of the contacts is to obtain, clarify, or exchange information.

BEST COPY AVAILABLE

Series	Grade	BMK #
GS-203	04	02

Factor 8, Physical Demands — Level 8-1 — 5 points

The work is sedentary with some movement to transport stacks of job applications (10 to 15 pounds) or to obtain file records.

Factor 9, Work Environment — Level 9-1 — 5 points

The work is performed in an office setting.

TOTAL POINTS — 805

BEST COPY AVAILABLE

OPM Benchmark Description

Series	Grade	BMK #
GS-203	04	03

PERSONNEL ACTIONS CLERK (DATA TRANSCRIBING)

Duties

Processes official personnel actions for an organizational segment with GS employees primarily in career, career-conditional, temporary, and limited appointments and a few excepted appointments, with supervisory guidance on new or unfamiliar types of actions.

— Maintains employee service record cards by organization, job, and name. Updates to show latest personnel actions.

— Reviews personnel action requests for accuracy of organizational data. Determines applicability of Federal benefits. Determines from files whether position is exempt or nonexempt from coverage under FLSA. Checks for supporting documentation as required for recurring personnel actions such as career-conditional appointments, resignations, and within-grade increases. Keeps notes and maintains own set of work samples as new and different types of actions are encountered.

— Assists new hires with completion of forms related to their appointments; e.g., security investigations, taxes, or health and life insurance. Provides brochures and brief explanations of Federal benefits.

— Follows up on due dates such as completion of probationary periods, supervisors' certifications required for processing within-grade increases, conversions from career-conditional to career appointment.

— Establishes and maintains Official Personnel Folders (OPF's). Obtains and consolidates records of prior Federal service. Determines creditable service for leave when computation is straightforward without exceptions or extenuating circumstances.

— Carries out employee requests for changes in health or life insurance coverage (transfer to another payroll office, name change, reinstatement, designation of beneficiary).

— Determines appropriate coding format (e.g., accession or separation) and operates a remote control terminal in responding to

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Series	Grade	BMK #
GS-203	04	03

computer queries for coded data. Reenters data in response to standard error messages. Proofreads printouts of official actions against approved requests and corrects obvious errors.

— Assists in reconciling computer records against service record cards.

— Answers questions regarding employees or pending actions such as verification of employment and due dates for within-grade increases.

Factor 1, Knowledge Required by the Position — Level 1-3 — 350 points

— Knowledge of a body of standardized personnel processing procedures which includes:

  o Knowledge of personnel processing language, data required, and options available to process recurring official personnel actions for employees primarily on career-conditional, career, temporary, and limited appointments, and a few kinds of excepted appointments.

  o Knowledge of the structure of the organization served to maintain master records of positions by organizational designation.

  o Knowledge of personnel coding to identify processing format and to answer computer queries for personnel data.

— Skill in operating a remote control terminal to key data into an automated system, to recognize standard error messages, and to make appropriate corrections, when the work must be performed in a timely manner.

Factor 2, Supervisory Controls — Level 2-2 — 125 points

The supervisor reviews incoming requests before assigning to the personnel processing clerks and gives specific processing instructions on personnel actions which the employee has not encountered before; e.g., how to obtain statement for remarks section of an official notice of a removal action.

The personnel actions clerk organizes recurring work to accomplish personnel actions within pay-period deadlines. Notes omissions or

BEST COPY AVAILABLE

Series	Grade	BMK #
GS-203	04	03

obvious mistakes in requests and contacts the appropriate administrative office or personnelist to clarify. Unfamiliar types of problems and significant discrepancies are referred to the supervisor; e.g., employee who failed to receive a pay check or was refused health benefits from the insurance carrier.

The automated system rejects certain types of errors. The supervisor reviews completed forms and personnel actions for technical accuracy and agreement of regulatory authority cited and nature of action with the purpose of the action.

Factor 3, Guidelines — Level 3-1 — 25 points

Manuals for processing personnel actions are explicit and extensive with many tables, subtables, and samples. Instructions on supplemental forms are usually self-explanatory. Agency coding instructions indicate the format prescribed for particular actions. To expedite the work, the clerk maintains desk samples.

The clerk seeks guidance from a higher grade employee when the instructions do not appear to fit the action being processed.

Factor 4, Complexity — Level 4-2 — 75 points

The personnel actions clerk completes a variety of recurring official personnel actions for an assigned segment of the organization.

Determines easily recognized differences in situations when choosing the proper processing treatment; e.g., career-conditional versus temporary appointment. Checks accuracy of organizational and position data on personnel action requests. Determines obvious applicability of Federal benefits. Determines creditable service for service computation date or other purposes when there are no complications such as extended periods of leave without pay or problems in verifying prior service. Establishes due dates for probationary periods, within-grade increases, and conversion to career appointments. Checks for inclusion of supporting documents and initiates supplemental forms for recurring personnel actions.

In addition to producing final personnel actions, processes a variety of forms for different personnel purposes such as security investigations, payroll deductions, health insurance, life insurance, transfer of records, or designation of beneficiary.

BEST COPY AVAILABLE

Series	Grade	BMK #
GS-203	04	03

Factor 5, Scope and Effect — Level 5-2 — 75 points

The clerk follows specific processing procedures, as appropriate, under various conditions and requirements.

Official personnel actions are used by payroll clerks in computing wages and serve as documentation of Federal service. The master personnel files serve as reliable sources in controlling the personnel ceiling and developing personnel reports.

Factor 6, Personal Contacts — Level 6-2 — 25 points

The clerk has personal and telephone contact with employees and supervisors, other personnel employees, payroll clerks, creditors, landlords, other personnel offices, and relatives of employees.

Factor 7, Purpose of Contacts — Level 7-1 — 20 points

The purpose of the contacts is to obtain employee data for processing personnel actions, security investigations, and related benefits; to verify employment; to answer questions about due dates for probationary periods and within-grade increases; and to provide general information about Federal employee benefits.

Factor 8, Physical Demands — Level 8-1 — 5 points

Works at a desk and occasionally moves around the office to obtain files.

Factor 9, Work Environment — Level 9-1 — 5 points

Work is performed in an office setting.

TOTAL POINTS — 705

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OPM Benchmark Description

Series	Grade	BMK #
GS-203	05	01

PERSONNEL ACTIONS CLERK

Duties

Processes official personnel actions for an organizational segment with wage and GS employees primarily in career-conditional, career, temporary, and limited appointments and a few excepted appointments; provides clerical support for recruitment activities.

— Processes a full range of recurring personnel actions for wage and GS positions such as variety of appointments, separations, promotions, changes to lower grade, reassignments, transfers, or mass change actions. Reviews personnel action requests for accuracy of agency code, existence and adequacy of supporting documents, appropriateness of the regulatory authority and the proposed action cited in relation to the intended purpose. Completes missing items such as date for completion of a temporary (NTE) appointment, and resolves discrepancies. Follows up on suspense dates. Codes personnel data for automated system. Checks the accuracy of computer-generated actions.

— Assists in recruitment activities by preparing/sending employment inquiries to applicants, arranging interview schedules, directing applicants to appropriate offices for interviews, arranging for physical examinations, verifying veterans' preference, and arranging for EOD dates. Annotates OPM certificate to show actions taken, assuring the "rule of three" and veterans' preference requirements are met. Confirms reporting dates using form letters.

— As appropriate for new appointments, obtains fingerprints and assists in completion of investigation forms; administers oath of office; explains pay rate; determines creditable service (SCD) for leave; has employee complete handicap code; sends packet of Federal employee benefits brochures and forms, service record, and time cards to the appropriate administrative offices; and schedules employees for orientation.

— As appropriate for employees who are retiring, resigning, or being separated, explains conversion of health and life insurance; explains option to obtain refund of retirement deductions; provides form to apply for unemployment compensation; and prepares records of Federal service for retirement purposes.

BEST COPY AVAILABLE

Series	Grade	BMK #
GS-203	05	01

— Answers questions regarding status of pending actions and verifies employment. Resolves processing problems such as failure to be promoted on the expected effective date or irregularities in pay checks.

Factor 1, Knowledge Required by the Position — Level 1-3 — 350 points

— Knowledge of a body of standardized personnel processing procedures which includes:

- o Knowledge of personnel processing language, procedures, and options available to process actions for employees primarily on career-conditional, career, temporary, and limited appointments, and a few kinds of excepted appointments.
- o Knowledge of the structure of the organizations served to route materials, to refer new employees, and to determine the corresponding agency codes.
- o Knowledge of coding to enter personnel data into the automated system.

— Knowledge of recruiting forms, procedures, and requirements to obtain OPM certificates; to observe the "rule of three" and veterans' preference requirements in working the certificate; and to coordinate job interviews, physicals, and EOD dates. (200 points)

Factor 2, Supervisory Controls — Level 2-2 — 125 points

The supervisor provides the continuing assignment with specific tasks to be performed and priorities to be observed. The supervisor assists with unusual problems.

The clerk organizes recurring work for the assigned block to accomplish personnel actions within pay-period deadlines. Notes discrepancies in requests and contacts the appropriate administrative office or personnelist to clarify or resolve; e.g., request to promote a nonstatus employee.

The automated system rejects certain types of errors. The supervisor checks the regulatory authority and nature of action codes when applying the appointing officer's signature.

BEST COPY AVAILABLE

Series	Grade	BMK #
GS-203	05	01

Factor 3, Guidelines — Level 3-2 — 125 points

Manuals for processing personnel actions are explicit and extensive with many tables, subtables, and samples. Instructions on forms are usually self-explanatory. Agency coding instructions indicate the format prescribed for particular actions (accessions, promotions, reassignments, separations, etc.). To expedite the work, the clerk maintains desk samples. An occasional problem may not be specifically covered by guidelines.

The clerk uses judgment in resolving problems not specifically described in guidelines. For example, when a retiring employee can not furnish proof of birth date, and official records show three different birth dates, the clerk establishes the accurate date from public school records.

Factor 4, Complexity — Level 4-3 — 150 points

Performs clerical recruitment tasks and a full range of personnel processing actions for an organizational segment with wage and GS positions.

Determines steps to be taken in processing a wide variety of unrelated personnel actions under different situations which require different treatment. Determines the inclusion of documents supporting unrelated personnel actions and initiates supplemental forms depending upon the nature of action being processed. Determines the compatability of the regulatory authority and nature of action to be used against the purpose of the action. Reviews dates and kinds of previous military and civilian service for creditability, and resolves problems when the record contains many breaks in service, leave without pay, and questionable creditability or coverage.

In addition to producing final personnel actions, processes a variety of different actions for various personnel purposes such as preemployment, security investigations, life insurance coverage, and establishment of SCD.

Factor 5, Scope and Effect — Level 5-2 — 75 points

The clerk follows specific processing and recruitment procedures, as appropriate, under various conditions and requirements.

BEST COPY AVAILABLE

Series	Grade	BMK #
GS-203	05	01

Completed official personnel actions are used by payroll clerks in computing pay. Master personnel files in the automated personnel system are relied upon in preparing reports and taking other personnel actions. Preemployment clerical work assists specialists in recruitment activities.

Factor 6, Personal Contacts — Level 6-2 — 25 points

Personal and telephone contacts are primarily with supervisors, job applicants, new and separating employees, administrative employees in the organizations served, other members of the personnel office, payroll clerks, creditors, releasing personnel offices, and employees of the health unit.

Factor 7, Purpose of Contacts — Level 7-2 — 50 points

The clerk resolves problems involving irregularities in employees' pay checks or benefits which require contacting payroll clerks or administrative personnel to develop suitable adjustments or to work out solutions to continuing problems. In addition to obtaining and providing personnel data, the clerk works cooperatively with others in the employment process by arranging for interviews of applicants with supervisors, arranging for physical examinations, and obtaining release dates for new employees that are within a time frame to meet the supervisor's needs.

Factor 8, Physical Demands — Level 8-1 — 5 points

The personnel actions clerk works at a desk and occasionally moves around the office to confer with workers or to obtain data from files.

Factor 9, Work Environment — Level 9-1 — 5 points

The work is performed in an open office setting with adequate light and heat.

TOTAL POINTS — 910

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OPM Benchmark Description

Series	Grade	BMK #
GS-203	05	02

PERSONNEL ACTIONS CLERK

Duties

Processes official personnel actions and maintains master files for a block of organizations which have many one-of-a-kind GS positions and a variety of positions in the excepted service such as consultants, special experts in scientific areas, staff fellows, visiting scientists, visiting associates, and medical staff officers.

— Maintains employee service record cards by organization, appropriation, job, and name. Updates to show latest personnel actions, and organizational or authorized personnel ceiling changes.

— Reviews personnel action requests for accuracy of organizational data. Determines applicability of Federal employee benefits based on regulatory authority and type of appointment (also length of appointment of employees on staff fellowship and visiting scientist program). Determines from files whether position is exempt or nonexempt from coverage under FLSA. Checks for supporting documentation as required for personnel actions such as removals, leave without pay, denial of within-grade increase, suspensions, return to duty, and various kinds of appointments (special approvals needed for scientific experts and service fellowship programs). If visiting scientist is not a U.S. citizen, considers resident-alien or nonresident-alien status and kind of appointment in determining pay deductions such as FICA.

— Conducts initial orientation sessions for new hires. Guides group in completion of forms related to their appointments. Provides brochures and brief explanations of Federal employee benefits.

— Applies formula in determining leave to be credited in converting from the Commissioned Corps to the competitive service. Follows up on due dates such as probationary and trial period ratings, supervisors' certifications of competence, and conversions from career-conditional to career. Checks for excessive leave without pay which affects the processing of within-grade increases and adjusts eligibility date as necessary. Determines that administrative pay increases and recommendations are within the rate range established for particular titles in the excepted service.

BEST COPY AVAILABLE

Series	Grade	BMK #
GS-203	05	02

— Carries out employee requests for changes in health or life insurance coverage (transfer to another payroll office, name change, reinstatement, designation of beneficiary), changes in tax codes, and allotments to be withheld.

— Precodes personnel action data for computer. Edits error listings and makes corrections. Reconciles computer records against service record cards and organization data.

— Answers questions regarding employment data such as conversion rights in changing from one kind of appointment to another, the dates and amounts of salary increases, eligibility requirements for benefits, etc. Resolves problems regarding employee pay or benefits requiring coordination with payroll clerks, health insurance carriers, etc.

Factor 1, Knowledge Required by the Position — Level 1-4 — 550 points

— Knowledge of personnel processing language, restrictions in kinds of appointments and corresponding benefits and options to process actions with different pay structures, appointment procedures, controls, and limitations for employees in a variety of excepted appointments, in addition to actions for employees on career-conditional, career, temporary, indefinite, and limited appointments. (550 points)

— Knowledge of the structure of the organization served to maintain master records of positions by organizational designation and appropriation. (200 points)

— Knowledge of standard coding procedures for the automated personnel system to enter and to correct errors in personnel data for the production of final personnel actions and follow-up reports for various suspense dates. (350 points)

Factor 2, Supervisory Controls — Level 2-2 — 125 points

The supervisor provides continuing assignments with specific tasks to be performed and priorities to be observed. The supervisor screens personnel action requests before giving to the clerk for completeness and accuracy of such items as regulatory authority and nature of

BEST COPY AVAILABLE

Series	Grade	BMK #
GS-203	05	02

action codes. The supervisor is available to assist with unusual problems or complaints.

The personnel actions clerk organizes recurring work to accomplish personnel actions within pay-period deadlines. Notes discrepancies in requests and contacts the appropriate administrative office or personnelist to clarify or resolve; e.g., code for merit pay not indicated on personnel action request involving promotion to GS-13 supervisory position.

The automated system rejects certain types of errors. After the clerk checks own work by comparing computer-generated actions against input data for accuracy, it is spot checked by the supervisor. Completion of supplemental input forms is not usually reviewed.

Factor 3, Guidelines — Level 3-2 — 125 points

Manuals for processing personnel actions are explicit and extensive with tables, subtables, and samples. Instructions indicate the format prescribed for particular actions (accessions, promotions, reassignments, separations, etc.). To expedite the work, the clerk maintains desk samples.

The clerk uses judgment in applying knowledge of such factors as length of appointment, appointment status, kind of visa, and regulatory authority in selecting the appropriate instruction.

Factor 4, Complexity — Level 4-3 — 150 points

The personnel actions clerk processes a full range of personnel actions for a block of organizations with many one-of-a-kind GS positions and a variety of special employment programs in the excepted service.

Determines applicability of Federal benefits based on kind of appointment, work schedule, and length of appointment. Determines steps to be taken in processing a wide variety of unrelated personnel actions in different situations which require different treatments. Determines periods of previous civilian, military or Commission Corps service and leave without pay in computing creditable service for service computation date. Determines the inclusion of documents documents supporting unrelated personnel actions and initiates

BEST COPY AVAILABLE

Series	Grade	BMK #
GS-203	05	02

supporting unrelated personnel actions and initiates supplemental forms depending upon the nature and purpose of action being processed.

In addition to producing final personnel actions, processes a variety of forms for different personnel purposes such as security investigations, payroll deductions, health insurance, and life insurance. Reconciles computer records against service record cards and organizational data.

Factor 5, Scope and Effect — Level 5-2 — 75 points

The clerk follows specific processing procedures as appropriate.

Official personnel actions are used by payroll clerks in computing pay and serve as documentation of Federal service or volunteer work. The master personnel files serve as reliable sources in controlling personnel ceiling and developing personnel reports.

Factor 6, Personal Contacts — Level 6-2 — 25 points

The clerk has personal and telephone contacts with employees and supervisors, other personnel employees, payroll clerks, computer operators, creditors, landlords, health insurance carriers, other personnel offices, and relatives of employees.

Factor 7, Purpose of Contacts — Level 7-1 — 20 points

The purpose of the contacts is to obtain employee data for processing personnel actions, security investigations, and related benefits; to resolve factual discrepancies on personnel actions or requests; to verify employment; to answer questions about due dates, effective dates, etc.; and to provide general information about Federal employee benefits.

Factor 8, Physical Demands — Level 8-1 — 5 points

The personnel actions clerk works at a desk and occasionally moves around the office to obtain files from cabinets.

Factor 9, Work Environment — Level 9-1 — 5 points

The work is performed in a pleasant office setting.

TOTAL POINTS — 1080

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OPM Benchmark Description

Series	Grade	BMK #
GS-203	05	03

PERSONNEL ACTIONS CLERK (TYPING)

Duties

Processes a full range of official personnel actions for employees under different personnel systems (GS and wage employees primarily in career-conditional, career, and temporary appointments; and Title 38 employees primarily in excepted appointments).

— Prepares form letters to notify new hires of EOD date and to transmit employment forms.

— Checks personnel action requests for appropriateness and adequacy of terms/codes and inclusion of supporting documents; e.g., action from full-time to part-time must have employee's request for part-time attached; promotion of Title 38 nurse must have board action attached. Determines the impact of the action upon eligibility for Federal employee benefits and probationary periods; e.g., Title 38 residents have health and life insurance, but are not covered by Federal retirement; Title 38 part-time employment is not credited toward completion of probationary period.

— Annotates pending personnel action on service record card and forwards to personnel action units. Forwards suspense notices to appropriate organization; e.g., GS and Wage: within-grade increase, probationary period, conversion of appointment; Title 38: license renewal (various kinds), proficiency rating, probationary period, renewal of pay agreement, and special advancement for performance. Follows up on overdue actions and expiration of NTE appointments.

— Assists new hires in completing forms related to appointments, administers oath of office, explains Federal employee benefits, uniform allowance, paydays, etc. For Title 38 employees, processes additional forms such as "agreement to receive special pay" and supplemental code sheets for physicians' and dentists' qualifications. Determines creditable service for leave and for completion of probationary periods.

For employees leaving agency rolls, explains options regarding Federal employee benefits; verifies creditable civilian and military

BEST COPY AVAILABLE

Series	Grade	BMK #
GS-203	05	03

service and recomputes SCD date, as required, for retirement applications.

— Periodically reconciles computer records with master personnel files. Reconciles personnel files with files in organizations served. Corrects discrepancies, e.g., employee not reported on extended LWOP, FLSA not noted on PD, or position numbers not cancelled.

— Compiles recurring strength reports, gains and losses reports, vacant positions, etc.

— Answers questions about personnel actions and pay; verifies employment.

— Types personnel forms and reports related to the work in final form.

— Precodes personnel action data for a wide variety of accessions, separations, position and pay changes, and other personnel changes.

— Establishes and maintains Official Personnel Folders (OPF's). Obtains and consolidates records of prior Federal service.

Factor 1, Knowledge Required by the Position — Level 1-4 — 550 points

— Knowledge of personnel processing language, procedures, restrictions, corresponding benefits, and options available to process a full range of official personnel actions for two fully developed personnel systems (GS/wage grade and Title 38 positions) which have different pay structures, appointment procedures, controls, and limitations. (550 points)

— Knowledge of the structure of the organization served to reconcile records, prepare strength and vacant position reports, etc. (350 points)

— Knowledge of coding for the automated personnel system to enter data and to correct errors in final personnel actions and follow-up reports. (350 points)

— Skill as a qualified typist to type personnel forms (remarks on official personnel actions, investigative requests, statistical reports,

BEST COPY AVAILABLE

Series	Grade	BMK #
GS-203	05	03

etc.) when timeliness is important to accomplish heavy workloads. (200 points)

Factor 2, Supervisory Controls — Level 2-2 — 125 points

The supervisor provides the continuing assignment with specific tasks to be performed and is available to assist with problems or complaints which arise.

The clerk organizes recurring work for the assigned block to accomplish personnel actions within pay-period deadlines, including large numbers of new residents processed at quarterly intervals. Notes routine discrepancies in requests and contacts the appropriate administrative office or personnelist to clarify or resolve. Checks with supervisor on unique problems.

Code sheets are reviewed by the supervisor for accuracy before data processing, and final personnel actions are reviewed by the appropriate personnel specialist before the appointing officer's signature stamp is applied. Completion of supplemental input forms is not reviewed.

Factor 3, Guidelines — Level 3-2 — 125 points

Manuals for processing personnel actions are explicit and extensive with many tables, subtables, and samples. Instructions on supplemental forms are usually self-explanatory. Agency coding instructions cover all but the most unusual situations.

The clerk uses judgment in applying knowledge of such factors as appointment status and regulatory authority in selecting the appropriate instruction.

Factor 4, Complexity — Level 4-3 — 150 points

The personnel actions clerk processes a full range of personnel actions for a block of organizations with GS, wage grade, and Title 38 positions.

Determines the steps to be taken for unrelated personnel actions in a variety of different situations which require different processing treatments. Checks appropriateness and adequacy of terms/codes

BEST COPY AVAILABLE

Series	Grade	BMK #
GS-203	05	03

and inclusion of supporting documents. Determines applicability of Federal benefits based on kind of appointment and work status. Reviews periods of previous civilian and military service in determining creditable service for various purposes.

In addition to producing final personnel actions, processes a variety of actions for different personnel purposes such as security investigations, health insurance, life insurance, license renewal, proficiency reports, or professional career development programs. Reconciles computer records against master personnel records; reconciles master personnel records with those in the organizations served.

Factor 5, Scope and Effect — Level 5-2 — 75 points

The clerk follows specific processing procedures as appropriate under various conditions and requirements.

Official personnel actions are used by payroll clerks in computing wages and serve as documentation of Federal service. The master personnel files serve as reliable sources in controlling ceilings and in developing personnel reports.

Factor 6, Personal Contacts — Level 6-2 — 25 points

The clerk has personal and telephone contacts with employees and supervisors, other personnel employees, payroll clerks, creditors, landlords, and other personnel offices.

Factor 7, Purpose of Contacts — Level 7-1 — 20 points

The purpose of the contacts is to obtain employee data for processing personnel actions and Federal employee benefits; to answer questions about the preparation of request forms submitted to the personnel office; to resolve factual discrepancies on personnel action requests; to verify employment; to follow up on suspense dates and to explain pay periods or effective dates; to provide general information about Federal employee benefits and processing procedures; and to review organizational data maintained by organizations served.

Factor 8, Physical Demands — Level 8-1 — 5 points

The personnel actions clerk works at a desk and occasionally

BEST COPY AVAILABLE

Series	Grade	BMK #
GS-203	05	03

transports a number of OPF's weighing about 25 pounds to organizations served; e.g., OPF's relating to pending board actions for nurses.

Factor 9, Work Environment — Level 9-1 — 5 points

The work is performed in a pleasant office setting.

TOTAL POINTS — 1080

BEST COPY AVAILABLE

Series	Grade	BMK #
GS-203	05	04

OPM Benchmark Description

STAFFING CLERK (TYPING)

Duties

Responsible for initiating and carrying out clerical procedures necessary to fill recurring vacancies for lower grade positions—from receipt of the personnel action request in the staffing unit until a selection has been made and the personnel processing unit is notified of the effective date for personnel action.

— Reviews routine personnel action requests to fill vacancies and determines whether to request OPM certificates of eligibles or process through the merit promotion program (MPP).

— Updates MPP announcements for recurring vacancies by making minor changes to previous announcements. Establishes promotion folders and controls applications received.

— Determines actions required to process applications for promotion to clerical positions: screens applications for eligibility on time-in-grade; obtains performance appraisals and employment vouchers from previous employers and references, as appropriate; develops brief employment histories from applications and official personnel folders; assembles package of applications, ranking forms, vacancy announcement, and ranking instructions for promotion panel; contacts panel members regarding their availabiiity and a suitable date for a meeting; arranges scores assigned by panel in numerical order; types promotion certificates and sends to selecting officials.

— Fills out requests for OPM certificates of eligibles. Contacts applicants regarding their interest and availability. Coordinates schedules for interviews of applicants with staffing specialists and/or selecting officials.

— When noncompetitive written test is required, provides sample questions, arranges for space, gives test instructions and times, collects test papers, and handscores or arranges for computer scoring.

— Determines the appropriate nature of action, regulatory authority, and salary to be entered on personnel action requests for routine staffing actions. Forwards completed and approved actions to the personnel processing unit.

BEST COPY AVAILABLE

Series	Grade	BMK #
GS-203	05	04

— Answers inquiries regarding such matters as the status of recruitment, kinds of vacancies in the organizations served, procedures for filing applications, dates and times of in-house and OPM examinations, receipt and disposition of request actions or applications, and general questions concerning Federal employment and employee benefits.

— Types correspondence, memorandums, forms, and other documents, including select or nonselect letters, vacancy announcements, promotion certificates, and reports.

— Maintains logs and files relating to the work such as open and closed OPM certificates, vacancy announcements, test scores, voluntary applications, career management program information, and performance evaluations.

Factor 1, Knowledge Required by the Position — Level 1-4 — 550 points

— Knowledge of staffing operations (e.g., recruitment sources and probability of available candidates; alternative staffing regulations, processes, and related documentation requirements; locally established staffing priorities and practices) in conjunction with a variety of staffing procedures to initiate, plan, and coordinate a series of interrelated clerical activities as required to fill a variety of recurring vacancies for lower grade positions by reinstatement, appointment, or promotion. (550 points)

— Knowledge of basic examining procedures to follow instructions for administering and scoring tests and to screen applications for clerical jobs on minimum qualification requirements. (350 points)

— Skill in typing promotion certificates, vacancy announcements, selection letters, employment forms, and reports in a timely manner. (200 points)

Factor 2, Supervisory Controls — Level 2-2 — 125 points

The supervisor initially sets out the tasks to be performed and the quality of work expected in the continuing assignment. The supervisor also provides instructions on new or revised procedures and is available for technical assistance, such as in handling derogatory information developed in vouchering a previous employer.

BEST COPY AVAILABLE

Series	Grade	BMK #
GS-203	05	04

The staffing clerk uses initiative in carrying out recurring work without instruction.

The supervisor determines that the work is performed on a timely basis and checks completed personnel action requests and promotion certificates for regulatory adherence.

Factor 3, Guidelines — Level 3-2 — 125 points

Guides include desk manuals and work samples (previous vacancy announcements and personnel actions), parts of the negotiated union contract pertaining to promotion, agency staffing procedures, and the merit promotion plan. Also included are personnel codes and clerical qualification requirements, most of which are memorized.

The guidelines are generally applicable to the work, but adaptation and judgment are required in their use; e.g., in revising vacancy announcements, developing employment histories, substituting education for experience in determining minimum eligibility of applicants for a few kinds of lower grade clerical positions.

Factor 4, Complexity — Level 4-2 — 75 points

The clerk carries out a variety of recruiting and staffing duties in support of an employment unit (screening applications, revising vacancy announcements, scheduling interviews, arranging for promotion panels and release dates, and completing personnel action requests to show type of personnel action, applicable regulation, and new salary of employee).

Determines whether routine requests to fill vacancies should be treated as recruitment actions or as internal promotion actions (e.g., entry level clerical positions are usually filled from OPM registers). For promotion actions to clerical positions, determines whether changes are required to update previous vacancy announcements (new organizational data, dates for receiving applications, etc.); whether a test needs to be administered; whether those applying meet time-in-grade requirements; whether a new performance appraisal is needed; and the data to be used in compiling employment histories. For recruitment actions, determines the appropriate examining offices from which to obtain certificates of eligibles and the

BEST COPY AVAILABLE

Series	Grade	BMK #
GS-203	05	04

actions required to set up interviews. After selection is made, determines the appropriate regulatory code and nature of action to be entered on the personnel action request and the appropriate pay step to be assigned.

Actions to be taken differ according to the type of position being filled, the number of similar vacancies, employment status of the applicant, and other factual data.

Factor 5, Scope and Effect — Level 5-2 — 75 points

The clerk follows employment and merit promotion procedures, practices, and rules.

This work furnishes supervisors with qualified candidates to consider in filling recurring kinds of vacancies and contributes to the efficiency of the employment office.

Factor 6, Personal Contacts — Level 6-2 — 25 points

Contacts are with candidates for jobs, operating supervisors and administrative staff in the local and district areas, other members of the personnel office, former employers, other personnel offices, and local union representatives.

Factor 7, Purpose of Contacts — Level 7-2 — 50 points

The purpose of the contacts is to work cooperatively with others in such activities as coordinating entrance-on-duty dates between the individual selected for appointment, the selecting supervisor, and the releasing office; discussing alternative sources of candidates when there are insufficient eligibles on a promotion or OPM certificate; and resolving minor difficulties or problems such as applicant emergencies which require adjustments to schedules, or supervisors who procrastinate in making selections.

Factor 8, Physical Demands — Level 8-1 — 5 points

Performs normal office activity, such as moving around the office, obtaining files, and ushering visitors to offices.

BEST COPY AVAILABLE

Series	Grade	BMK #
GS-203	05	04

Factor 9, Work Environment -- Level 9-1 — 5 points

The work is performed in a pleasant office setting.

TOTAL POINTS — 1035

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PART II

PERSONNEL ASSISTANT POSITIONS

OCCUPATIONAL INFORMATION

Assistant positions may be found in every personnel-related function and in a variety of work settings—civilian personnel offices, training centers, examining or job information offices, labor relations offices, or administrative offices supporting organizations—depending upon local workload and employment practices, for example:

— When personnel specialists need assistance with heavy workloads and the size of the staff permits structuring less difficult or routine technical duties into assistant positions;

— In areas remote from the servicing personnel office, when the restricted nature of the personnel function only warrants assistant positions (with no specialists on the staff); or

— In upward mobility programs, when "bridge jobs" are established to give clerks an opportunity to demonstrate their capacity for growth into higher levels of work.

Typical Assistant Duties

Assistant duties in separate specializations are as distinct from each other as the separate personnel occupations to which they relate. Following are examples:

Classification

— Reviewing position descriptions (PD's) for consistency with related PD's, approved organization, etc.

— Reviewing classification standards to identify key occupational characteristics and evaluation criteria and to draft questions intended to elicit the kind of information needed from employees (questions are reviewed by a classification specialist before being used as a guide in conducting job audits).

— Interviewing employees and supervisors to obtain job facts.

— Consulting with supervisors to correct discrepancies in PD's and organizational relationships.

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GS-203
Part II

— Writing PD's and amendments to update or correct PD's for clerical and technical positions which can be described in terms of steps, procedures, and common techniques and skills.

— Applying classification standards for common occupations which have readily identifiable evaluation criteria and grading patterns to positions which have been screened to avoid controversial situations.

— Writing evaluation statements explaining how the classification was determined by direct comparison to a classification standard.

— Assisting as a junior member of a team in special classification or organizational studies; e.g., implementing new classification standards by conducting standardized interviews and rewriting PD's in a different format.

Employee Development

— Revising or updating questionnaires to survey employee interest in specific training courses or seminars.

— Conducting population analysis of audience to be trained for use by specialists in developing training objectives.

— Revising existing lesson plans to update procedural information; e.g., procedures for completing and submitting documents, or timekeeping.

— Abstracting data from established lesson plans in developing descriptions of content and objectives of training courses.

— Selecting participants for training courses considering the relatedness of training to the mission of the employees' organizations.

— Requesting local subject-matter experts to serve as instructors in recurring programs.

— Monitoring career development programs by interviewing interns or trainees at various stages of development; substituting similar courses when there are work conflicts.

— Determining whether proposed training will affect employee

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GS-203
Part II

qualifications or their eligibilities for different clerical or technical jobs.

- Orienting employees in the use of self-teaching aids.
- Presenting classroom instruction in a limited number of simple subjects using established lesson plans.
- Reviewing students' evaluations of training courses and summarizing salient points.

Employee Relations

Certain employee services (such as routinely processing retirement and workers' compensation cases; soliciting blood donors; making detailed arrangments for employee picnics or similar activities; editing articles for an employee newsletter; and disseminating information about open season for health insurance) do not meet the definition of the employee relations specialty. To be considered in the employee relations assistant specialization, the services must be of a technical nature and for the purpose of contributing to satisfactory production, motivation, morale, and discipline of employees. Examples:

- Discussing with employees their continued failure to pay debts, explaining the Government's position, exploring possible solutions, and composing letters to notify creditors of employees' plans.
- Interviewing employees in probationary periods and their supervisors to develop facts regarding possible false information on applications originally furnished by employees.
- Serving as executive secretary to a performance rating board, reviewing justifications for employee recognition awards, advising management officials why recommendations do not meet award criteria, explaining appeal procedures, writing summaries of board meetings, preparing resumes of awards for publication and briefing outlines for awards ceremonies.
- Writing drafts of local personnel instructions such as requirements for annual performance ratings or preparation of disciplinary actions.

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GS-203
Part II

Labor Relations

A separate labor relations unit is usually established only when warranted by a workload involving a number of active unions at an installation. Examples of typical duties in this speciality are:

- Developing facts regarding specific complaints to determine potential violation of negotiated agreements.
- Resolving routine complaints or problems by explaining or interpreting personnel policy such as:
  - o Conditions under which sick leave is normally approved; difference between AWOL and LWOP; conditions for granting court leave; and how to obtain advanced leave;
  - o The employee's rights and management's rights in grievance cases; and
  - o Policy for garnisheeing salaries.
- Reviewing draft personnel policies, such as those governing hazardous weather or religious observances, to determine whether consultation or negotiation is required with union(s).
- Attending union meetings with a labor relations specialist and following up on assigned action items; e.g., checking with management officials regarding rumored reorganization or change in policy.
- Assisting labor relations specialist by reviewing labor relations literature or files for similar grievances, searching case law to identify precedent for current labor relations problem, or searching unfair labor practice complaints for potential problems in handling current complaints.
- Summarizing previous similar labor relations cases, pointing out the relevance of these cases to current case.

Staffing

Staffing assistants do work associated with the recruitment, examination, selection, and placement of employees. Positions may be located in centralized or decentralized examining units, placement

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units within civilian personnel offices, or administrative offices supporting organizations.

Staffing assistants in all work settings use personnel evaluation techniques and staffing principles in determining that applicants meet the requirements for employment or in ranking eligibles so that the best qualified can be considered first. They need to use sound and consistent judgment and have an understanding of the basic characteristics of clerical and technical occupations in order to apply established guides or qualification standards. Examples:

- Interviewing supervisors and reviewing position descriptions to develop job facts for purposes of justifying selective factors or determining the similarities or differences in jobs for recruitment planning.
- Assisting individual candidates in identifying positions for which they might be rated eligible by reviewing their qualification statements, asking questions to draw out or clarify data, and suggesting appropriate examination announcements and career ladders.
- Consulting with managers regarding basic skills needed for low grade jobs being filled by appointments under special hiring authorities.
- Composing job vacancy announcements for lower grade positions by abstracting a description of the work from the PD, qualifications required in standards, basis for rating, and other appropriate data from the merit promotion plan.
- Explaining superior academic achievement requirements; reviewing college transcripts to determine if "honor society" is authorized for credit.
- Explaining substitution of education for experience for specific jobs or occupations.
- Assisting a promotion or qualifications rating panel by screening applications for lower grade positions on minimum qualifications, explaining rating instructions to panel, and checking the ratings and rankings for obvious indications that instructions were not followed.

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GS-203
Part II

— Comparing written applicant background data against minimum qualification criteria to determine eligibility for entry in a file with possibilities of future consideration for employment; e.g., initial entry in an applicant supply file or deferred-rated competitor inventory.

— Identifying major duties of specific lower grade positions being filled in order to determine and apply minimum qualification requirements.

— Determining the relative degree to which applicants for clerical and technical positions meet ranking factors in merit promotion plans.

— Explaining to candidates for lower grade jobs why they were not rated eligible or ranked among the best qualified.

— Conducting routine interviews to determine satisfactory placement and job adjustment.

Personnel Assistant

Personnel assistants do limited technical work requiring a practical knowledge of civilian personnel management not covered by a recognized personnel specialization, or they perform work in two or more specializations. For example, in a generalist personnel program, personnel assistants may do technical support work in both the classification and staffing specialties. In a satellite personnel office or in an administrative office supporting an operating organization, personnel assistants do work such as coordinating recruitment and placement actions, assisting with matters involving employee discipline or performance ratings, answering questions regarding personnel policies, and acting as liaison between the organization and the servicing personnel office.

GRADING OF PERSONNEL ASSISTANT POSITIONS

Nonsupervisory personnel assistant work is to be evaluated on a factor-by-factor basis by reference to the appropriate criteria in Part II. Certain references to factor levels in Part I, Personnel Clerical Positions, have been repeated in Part II to assist in distinguishing

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between clerical and assistant evaluation factors and to reduce the need to consult different parts of the standard in making evaluations. Should a position factor in a job being classified appear to be below the *lowest* factor-level description in Part II, Part I should be consulted. Should a position factor in a job being classified appear to be above the *highest* factor-level description in Part II, the Primary Standard is to be used to evaluate the factor.

Benchmarks are not included for assistant positions in the classification, employee development, employee relations, and labor relations specializations. Assistants in these specializations are relatively few in number, and there is generally no common structure of positions and career patterns across agency lines.

Benchmarks for staffing assistants in Part II together with benchmarks for staffing clerks in Part I serve as a model for cross-specialization evaluation of assistants and clerks in other specializations of this occupation.

The Work Leader Grade-Evaluation Guide is to be used for positions meeting the criteria in that guide.

The Supervisory Grade-Evaluation Guide is to be used for positions meeting criteria for classification as supervisors.

GRADE CONVERSION TABLE

Total points on all factors are converted to GS grades as follows:

Grade	*Point Range*
4	655-850
5	855-1100
6	1105-1350
7	1355-1600
8	1605-1850
9	1855-2100

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GS-203
Part II

FACTOR LEVEL DESCRIPTIONS FOR PERSONNEL ASSISTANTS

FACTOR 1, KNOWLEDGE REQUIRED BY THE POSITION

Factor 1 measures the nature and extent of information or facts which the assistant must understand to do acceptable work (e.g., steps, procedures, practices, rules, policies, regulations, and principles) and the nature and extent of the skills needed to apply those knowledges. To be used as a basis for selecting a level under this factor, a knowledge must be required and applied.

NOTE: To further illustrate basic differences between clerks and assistants and to facilitate evaluation of borderline clerk/assistant positions using this standard, the following chart provides a comparison of Level 1-3 (clerical knowledges) and Level 1-4 (assistant knowledges).

If the knowledge factor of a position is determined to be essentially clerical in nature (e.g., Level 1-3 below), then all factors must be evaluated by Part I. If assistant knowledges are required (e.g., Level 1-4 below), the other factors should also be evaluated by Part II. While assistants may also perform some clerical work as described in Part I, that work would not be paramount or grade determining.

Examples under Level 1-3 in this part duplicate and sometimes supplement examples in Part I.

Clerical	Assistant
Level 1-3 — 350 Points	*Level 1-4 — 550 Points*
Knowledge of a body of standardized personnel rules, procedures, or program operations to perform or explain a range of clerical procedures in support of a personnel specialty or program area.	A practical knowledge of specialized personnel methods, regulations, or principles to perform limited technical work of a noncontroversial nature. This usually includes skill in conducting recurring types of interviews to develop facts such as job content or circum-

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Clerical	Assistant
Level 1-3 (Continued)	*Level 1-4* (Continued)
	stances concerning an incident; analysis of readily understood technical subjects or kinds of work; and/or composition of narrative reports, questionnaires, summaries or letters explaining routine technical actions. At this level, knowledges are used in a narrow or limited way; e.g., indepth study of a few types of lower grade positions or less detailed considerations covering a broader category of positions.

CLASSIFICATION

Knowledge of a body of standard procedures and terminology related to classification activities to perform a range of clerical duties, such as authorizing identical-additional (IA) positions when the record clearly shows that additional positions may be established; preparing cyclic review listings and following up on overdue reports; and reconciling organizational records with master personnel files.

A practical knowledge of job analysis techniques and classification principles to perform limited technical tasks involving noncontroversial situations or lower grade positions, such as:

— Interviewing supervisors to determine that content of job warrants use of an IA position number.

— Reviewing competitive levels for discrepancies and adequacy of justifications; or, as appropriate, rewriting justifications for classifier's review.

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GS-203
Part II

Clerical	Assistant
Level 1-3 (Continued)	*Level 1-4* (Continued) — Assisting classifier by identifying classification criteria in standards and preparing questions to be asked on desk audit to elicit appropriate data. — Assisting a team with application of clerical standards by revising OPM benchmarks with agency data in preparing drafts of standardized position descriptions for comments by reviewers. — Conducting random sample desk audits to determine currency of PD's and organizational data; or writing amendments to update duties.

EMPLOYEE DEVELOPMENT

Knowledge of a body of standard procedures and terminology related to employee development activities to perform a range of clerical duties such as processing training requests and training contracts (by reviewing requests for completeness, coding training data for automated system, coordinating notification of employees approved for train-

A practical knowledge of employee development principles and potential subject-matter resources to perform limited technical support work, such as:

— Selecting trainees on the basis of relatedness of subject matter to the mission of the organization when courses are oversubscribed; e.g., selecting supply employees for supply subjects before

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GS-203
Part II

Clerical

Level 1-3 (Continued)

ing and changes in schedules, obtaining course evaluations from students, and verifying that training was completed); keeping records to assure that new supervisors receive the required basic training; maintaining records of monies spent for various kinds of training and career development; reserving spaces, obtaining audiovisual equipment, and reproducing and assembling student handouts; arranging for travel of trainees; arranging for printing and distribution of questionnaires and memos regarding training courses; and maintaining career-development folders on individual employees.

Assistant

Level 1-4 (Continued)

employees from other organizations; or contacting appropriate school to request extra spaces.

— Identifying and contacting local subject-matter experts as last minute replacement instructors in recurring training programs.

— Reviewing catalogs and contacting libraries for suitable films for local training courses; as requested, introducing film to audience; or demonstrating use of self-teaching equipment.

— Ascertaining that employees have prerequisites for courses; e.g., grade level and previous courses completed.

— Revising questionnaires to survey employee interest in specific training/seminars.

— Interviewing interns and employees in upward mobility programs at various stages of development to verify progress, ascertain continued interest, and determine if there are any problems; substituting similar courses to resolve

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Clerical	Assistant
Level 1-3 (Continued)	*Level 1-4* (Continued)
	conflicts in employee schedules; and referring problems to specialists (e.g., employee wanting to make major changes in training plan).

EMPLOYEE BENEFITS

Knowledge of a body of standard procedures for Federal employee benefits to perform a range of clerical duties, such as: explaining the basic features of plans and time limits for filing for health insurance; completing forms to process a variety of actions or changes in health insurance benefits at employee's request; explaining the amount and cost of regular and optional Federal life insurance; assisting employee in completing requests for insurance and designations of beneficiaries; determining whether conditions are met for reinstatement of insurance; explaining conversion of life insurance to separating employees; explaining the basic features of the Federal retirement program and established options such as survivor's benefits and opportunity to

A practical knowledge of regulations concerning Federal employee benefits and skill in fact-finding to investigate noncontroversial cases by obtaining relevant facts, evaluating the adequacy of these facts in light of established precedents, explaining options available to the employee based upon analysis of individual cases, etc. For example: investigating and developing facts concerning on-the-job injuries or illnesses; processing routine claims which require identifying and substantiating relevant information in written narrative reports; explaining options regarding leave for time off the job and potential compensation; writing draft instructions concerning the Federal worker's compensation program.

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Clerical	Assistant
Level 1-3 (Continued)	*Level 1-4* (Continued)
pay back previous refunds; computing SCD for retirement and estimating annuities by feeding prescribed data into computer; and completing forms to accomplish routine retirement actions.	

INCENTIVE AWARDS PROGRAM

(Clerical or assistance work relating to the incentive awards program is covered by this series when it is an integral part of the civilian personnel program, the position requires personnel clerical and assistant knowledges, and career progression is personnel related.)

Knowledge of a body of standard incentive award processing procedures (e.g., numbering system, established routing patterns, correspondence and report requirements) to assign control number; review submissions for completeness and request missing information from submitting office; route suggestions for review; acknowledge receipt and prepare other correspondence using forms or sample letters; follow up on overdue evaluations; identify employees eligible for length-of-service awards; compile statistical reports requiring computation of average rates of participation, adoption, tangible

Practical knowledge of regulations and requirements pertaining to the incentive awards program to review subject matter of suggestions for similarities to previous submissions and select appropriate reviewing officials or to interview employees and supervisors to obtain additional information (e.g., documentation regarding nature and extent of potential tangible and intangible benefits installationwide and agencywide); to screen justifications for performance awards for factual documentation; to recommend dollar amount of award based on local precedent and regulations; to

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Clerical	Assistant
Level 1-3 (Continued) benefits, total amount awarded, distribution of performance awards by grade level and organizational components, etc.; prepare for award ceremonies by reserving space, arranging for printing of programs, preparing award certificates, etc.; and code completed actions for automated files and maintaining file copies.	*Level 1-4* (Continued) prepare summary descriptions of approved awards for publication; and to compose letters outlining reasons why committee did not recommend approval.

LABOR RELATIONS

Knowledge of a body of standard procedures and terminology related to labor relations activities to perform a range of clerical duties, such as arranging for proofreading, printing, and distribution of union contracts; arranging for arbitration hearings by reserving space, arranging for parking, obtaining copies of documents, notifying participants of dates and times, etc.; processing dues deductions and requests for allotment changes; and maintaining records concerning grievances, contracts, negotiations, etc.

Practical knowledge of labor relations and the content of negotiated agreement(s) to perform limited technical work involving recurring types of questions, simple explanations of personnel policies, and development of facts of cases. For example:

— Screening union questions or complaints by drawing out facts to determine the nature or scope of the problem and informally resolving recurring questions that can be satisfied by an explanation of basic personnel policies such as approvals of sick leave or use of AWOL; referring significant griev-

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GS-203
Part II

Clerical	Assistant
Level 1-3 (Continued)	*Level 1-4* (Continued)
	ances, potential unfair labor practice cases, and other controversial matters to the labor relations specialist. — Interviewing operating supervisors to develop facts about reported rumors or to obtain background information regarding particular incidents or working conditions; summarizing facts for use by the labor relations specialist.

STAFFING

Knowledge of a body of standard procedures and terminology related to staffing activities to perform a range of clerical duties, such as preparing forms to request certificates of eligibles, assuring attachment of documents such as PD and justification of selective or ranking factors, as needed; determining appropriate examining office to which request should be sent; administering and scoring written tests following specific procedures; explaining merit promotion procedures and forms to file for reinstatement or transfer; explaining job

A practical knowledge of evaluation techniques and staffing (examining, recruitment, or placement) principles to perform limited technical tasks involving recurring vacancies and readily understood kinds of work or lower grade positions (e.g., clerk, clerk-typist, messenger, stenographer), or to screen applicants for a variety of occupations on the basis of minimum experience and educational requirements; and to perform similar work such as the following:

— Interviewing supervisors to determine the adequacy of a

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GS-203
Part II

Clerical	Assistant
Level 1-3 (Continued) vacancies for which applications are being accepted; and updating applicant data on an inventory of eligibles to show action on certificates or to change location, kinds of appointments or salaries applicants are willing to accept; providing information about how to obtain eligibility for higher grades (e.g., retake test or update application with additional experience); preparing certificates of eligibles from prerated inventories and auditing used certificates.	*Level 1-4* (Continued) previous job vacancy announcement and the nature of changes to be made or to discuss recurring vacancies for which the same recruitment source might be appropriate. — Screening applications by determining minimum requirements are met (including substituting education for general or specialized experience) for initial entry on a deferred-rated competitor inventory or applicant supply file. (Note: This type of screening does not require analysis of duties in positions to be filled.) — Evaluating the relative value of individual qualifications using specified factors to place applicants in rank order on an inventory or register used to fill a few kinds of related lower grade positions; e.g., promotion register for stenographers or clerks used to fill positions installationwide.

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GS-203
Part II

Level 1-5 — 750 points

A practical knowledge of specialized personnel methods, regulations, principles, or concepts to carry out limited technical projects such as recommending changes to local personnel instructions; analyzing a variety of specific lower grade positions; and investigating minor employee complaints, problems, or infractions of rules. At this level, interviewing, analytical, and writing skills are used in connection with moderately complex personnel subjects and techniques, or a wider variety of clerical, technical, or entry-level professional and administrative jobs. Illustrations:

Classification:

A practical knowledge of job analysis techniques and classification/grading principles and concepts to classify a variety of lower grade clerical and/or technical positions which have standard career patterns using standards that clearly apply or that are used repetitively for cross-series comparison; for example:

— Classifying a variety of recurring patient-worker positions in an industrial therapy program; obtaining draft PDs and interviewing supervisors, as needed, to obtain sufficient facts for classification.

— Auditing and rewriting a variety of clerical and technical positions in a new PD format; preparing for audit by reviewing the appropriate standards and organizational relationships.

— Analyzing lower grade positions and applying classification standards for a variety of common occupations (screened for controversial situations) such as dental assistant, statistical assistant, file clerk, data transcriber, laborer, truck driver, warehouseman, etc.; writing brief job evaluation statements in support of the classifications.

Employee Development

A practical knowledge of employee development principles and techniques to make classroom presentations following established course materials for simple subjects or to review comments or surveys to recommend changes in curricula or various aspects of the employee development program, and similar work; for example:

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GS-203
Part II

- Presenting classroom instruction in a limited number of basic subjects such as timekeeping, position description writing, and effective listening, using established or commercial lesson plans.
- Revising/updating procedural aspects of lesson plans.
- Reviewing and summarizing course critiques; identifying possible changes based on the nature of students' comments.
- Determining whether the proposed training will affect employee qualifications or eligibilities for entry into other clerical or technical jobs or career patterns.

Employee Relations

A practical knowledge of employee relations principles and counseling techniques to resolve minor employee problems or perform recurring types of technical work for the purpose of contributing to the satisfactory production, motivation, morale, or discipline of employees; for example:

- Advising individuals regarding minor problems of employee conduct or dissatisfaction, poor work habits, indebtedness and financial assistance; conducting interviews to draw out and organize pertinent facts of the situation; exploring alternate ways of solving the problem or recommending disciplinary action.
- Explaining to supervisors the nature of records or sequence of actions required in connection with recurring disciplinary problems such as excessive unplanned absences; assisting in writing admonishment letters.
- Serving as executive secretary for an employee recognition awards program; reviewing justifications for technical adequacy; explaining why criteria is not met; explaining employee options if dissatisfied with performance rating.

Labor Relations

A practical knowledge of labor relations regulations, principles, and practices and the interrelationships of local negotiated contract(s) and personnel management objectives, policies, and procedures to resolve minor union complaints and allegations, or to

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carry out limited technical projects involving moderately complex labor relations subjects; for example:

- Assisting labor relations specialist by reviewing labor relations literature or files for similar grievances; searching case law to identify precedent for current labor relations problem; searching similar unfair labor practice complaints for potential problems in handling current case.
- Reviewing previous similar labor relations cases to identify major issues and compare their relevance to a current case.
- Listening to complaints or grievances of union members; asking questions to draw out facts; explaining employee rights, management's rights, procedures for filing grievances, and the distinction between the union contract and established personnel policies; exploring alternate solutions; referring significant or new problems to labor relations specialist.

Staffing

A practical knowledge of evaluation techniques and staffing (examining, recruitment, or placement) principles to interpret qualification standards for a variety of clerical and technical occupations (telephone operator, accounting technician, payroll clerk, editorial assistant, equipment operator, supply clerk, medical technician, etc.) by identifying major duties or type of work in jobs being filled and the kind of applicant experience/education to be credited toward meeting the general and specialized qualifications; or to rate applications for employment or promotion to various lower grade positions on the basis of selective and ranking factors in a crediting plan or rating schedule, determining the degree to which each factor is met and assigning a numerical rating.

- Developing promotion announcements for clerical and technical occupations by abstracting duties from position descriptions or information from supervisors and descriptions of the qualification requirements from standards.
- Analyzing duties of jobs to be filled in applying a variety of qualification standards for clerical and technical occupations to determine eligibility of applicants for specific job vacancies.

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GS-203
Part II

— Evaluating the relative value of individual qualifications against specified criteria for the purpose of ranking applicants for specific jobs; e.g., for positions through GS-9, assigning point values for factors such as Training and Development, Outside Activities, Awards, and Experience, according to procedures described in the local merit promotion plan.

FACTOR 2, SUPERVISORY CONTROLS

"Supervisory Controls" covers the nature and extent of direct and indirect controls exercised by the supervisor, the assistant's responsibility, and the review of completed work. The supervisor controls work in the way assignments are made, instructions are given, priorities and deadlines are set, and objectives and boundaries are defined. Responsibility of the assistant depends upon the extent to which the assistant is expected to develop the sequence and timing of various aspects of the work, to modify or recommend modification of instructions, and to participate in establishing priorities and defining objectives. The degree of review of completed work depends upon the nature and extent of the review; e.g., close and detailed review of each phase of the assignment, detailed review of the finished assignment, spot check of finished work for accuracy, or review only for adherence to policy.

NOTE: When classifying mixed grade assistant positions involving duties which require different knowledge levels and different levels of supervision, the overall level assigned for Factor 2 must be based on the same set of duties used in selecting the level for Factor 1, Knowledge Required by the Position.

Level 2-2 — 125 points

The supervisor is a specialist who has delegated authority and responsibility for technical actions. The supervisor provides a continuing assignment, indicating generally what is to be done, quantity expected, deadlines, and priority of work. The supervisor provides additional, specific instructions for new, difficult, or special projects, including suggested work methods or advice on the availability of source materials.

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GS-203
Part II

The assistant uses initiative in carrying out recurring work according to instructions, policies, or previous cases, e.g., substitutes education for general experience in a limited occupational category and gives standard explanations of personnel regulations and policies. Obtains assistance from a higher grade employee with problems and unfamiliar situations not covered by instructions.

The supervisor assures that finished work is accurate and in compliance with instructions. Recurring kinds of work products such as examination ratings, data assembled, candidates approved for training, and additional-identical positions established are usually reviewed for appropriateness and spot checked for accuracy. Actions involving a potential adverse impact upon employees or changes in employee pay are carefully reviewed for accuracy. Review of the work increases with more difficult assignments and when similar assignments have not been performed previously.

Level 2-3 — 275 points

The supervisor defines the overall objectives and priorities of the work and assists the employee with unusual situations which do not have clear precedents.

The assistant plans the work, resolves problems, and makes adjustments within established policy. Examples:

— Recommends alternative actions to supervisor, e.g., if there are insufficient suitable candidates for a particular position, might recommend position being restructured for classification to a lower grade for which more candidates are available.

— Resolves discrepancies between approved position descriptions and job audit information regarding the major duties performed by an employee.

— Changes content of orientation programs to suit the needs of different audiences; and

— Adjusts training schedules of interns to resolve work/school/vacation conflicts.

Work products such as job vacancy announcements, ranking factors identified for rating schedules, position descriptions, job evalua-

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tion statements, recommendations for disciplinary action, recommended changes in training courses, and draft policy statements are reviewed for overall appropriateness, apparent technical soundness, and conformance to policies. The methods used in arriving at these products are not usually reviewed in detail.

FACTOR 3, GUIDELINES

This factor covers the nature of guidelines and the judgment needed to apply them. Assistants use guides such as work samples and desk manuals; local policies and practices; pamphlets pertaining to Federal personnel programs; training catalogs and established lesson plans; merit promotion plans; classification, grading, and qualification standards; rating schedules; laws, regulations, and precedent-setting cases; and references such as *Federal Personnel Manual* issuances pertinent to the program to which assigned, OPM examining manuals, and agency directives.

Individual jobs vary in the specificity, applicability, and availability of the guidelines for performing assignments. Consequently, the constraints and judgmental demands placed upon assistants also vary. For example, the existence of specific instructions, procedures, and policies may limit the opportunity of the assistant to make or recommend decisions or actions. However, assistants may use considerable judgment in applying generally stated policies or objectives to individual situations.

Level 3-1 — 25 points

Guidelines are specific and detailed such as specific questions to be asked in conducting an interview or specific requirements established by OPM; e.g., controlling test materials.

The assistant adheres strictly to the guidelines. Deviations must be approved by, or channeled through, the supervisor.

Level 3-2 — 125 points

Guidelines cover established personnel practices, rules, conditions, requirements, etc.; for example: *Federal Personnel Manual* issuances,

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GS-203
Part II

agency directives, technical manuals, and local policies as appropriate to the assignment. At this level, assistants may also use a few kinds of standards which have readily identifiable or clear-cut criteria related to easily understood kinds of work. The assistant selects the proper guidelines according to circumstances of the specific case (e.g., determining substantive documentation needed for on-the-job injuries, considering the nature of the injuries, how they occurred, any outside medical treatment, the number of days absent from work; determining the appropriate series coverage for common kinds of work; or determining the procedure for filling various lower grade positions considering the availability of candidates for recurring vacancies). Such judgments may include determining which of several alternatives to use, and applying well understood criteria or deviations for which precedents have been clearly established. Situations to which existing guidelines cannot be applied or significant proposed deviations are referred to a higher grade member of the staff.

Level 3-3 — 275 points

Guides at this level have criteria, concepts, examples, or precedents which apply generally, but not specifically, to the situation/case being resolved. The assistant may use one or more of the following on a recurring basis:

— Laws and regulations pertaining to a personnel specialty;

— Classification and grading standards; guides for writing position descriptions;

— Precedent decisions regarding unfair labor practices and grievances; reports and decisions of the Federal Labor Relations Authority;

— Comptroller General decisions;

— Lesson plans;

— Qualification standards and rating schedules.

The assistant uses judgment in determining the appropriateness or applicability of the guide(s) to a specific situation/case, comparing the degree or extent of subject-matter similarities and differences

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GS-203
Part II

(e.g., comparison of job facts to classification criteria, experience/training to qualification requirements in a variety of standards, circumstances of alleged unfair labor practices or grievances to precedent-setting cases, student needs and backgrounds to lesson plans), recommending changes in local guides, or drafting procedural guides and policies for employees and supervisors.

FACTOR 4, COMPLEXITY

This factor covers the nature, number, variety, and intricacy of tasks, steps, processes, or methods in the work performed; the difficulty in identifying what needs to be done; and the difficulty and originality involved in performing the work.

Level 4-2 — 75 points

The work consists of standard explanations of personnel programs or policies and/or repetitive evaluations; for example, one or more of the following:

— Administering and scoring several kinds of written tests; determining eligibility for veterans' preference; and determining minimum eligibility of applicants for lower grade positions in a few occupations.

— Explaining leave policies; e.g., procedure for obtaining maternity leave, practices in connection with court leave, or compiling data on sick leave usage.

— Explaining job vacancies for which applications are being accepted or procedures for applying under the merit promotion plan.

Technical factors to be considered are usually apparent or they can be readily identified. Routine questions may be required to clarify the kind of information sought or to determine appropriate action needed. There are few problems in indentifying and correcting discrepancies.

Final actions or responses differ in factual ways depending upon the background of applicants, positions to be filled, or personnel information requested.

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GS-203
Part II

Level 4-3 — 150 points

The work consists of evaluations and analyses involving practices and principles of the personnel specialty to which assigned. Examples:

— In employee relations work, counseling employees regarding problems such as poor leave records or debts.

— In classification work, making direct application of classification standards to positions in a variety of clerical and technical occupations; developing justifications for competitive levels.

— In labor relations work, informally resolving complaints which require interpretation of personnel regulations and explanation of management's rights and employee rights; identifying and referring potentially controversial or significant problems to specialists.

— In examining work, evaluating individual experience statements and education for a variety of specific entry-level jobs in professional and administrative occupations.

The assistant identifies the scope or nature of the problem, question, situation, or evaluation (complaint, grievance, position to be classified or filled, training or orientation program to be given, derogatory information or discrepancies in investigative data). Determines the need for and obtains additional technical information through interviews and/or review of technical manuals considering such factors as the similarities of different jobs for common treatment, the similarities of situation/case to precedent-setting cases, the applicability of measurement criteria or the purpose and subject matter involved. Examples:

— Before counseling an employee regarding abuse of sick leave, the assistant reviews the employee's leave record to identify patterns of unplanned absences and develops pertinent data from various sources.

— In classifying clerical and technical positions, the assistant considers the nature and grade level of various duties and the percentage of time spent in their performance.

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— In resolving complaints informally, the assistant considers the particular circumstances of the situation and the relationship to similar situations and the way they were resolved.

— In evaluating experience statements, the assistant considers the job-relatedness, length, and level of previous experience in connection with specific jobs.

The work involves identifying and studying factors or conditions and determining their interrelationships as appropriate to the specialized work; for example, one or more of the following:

— The significance of a good work performance history in light of minor disciplinary problems in performing employee relations work;

— The consistent application of classification criteria to clerical and technical jobs and lateral and vertical alignments with other jobs;

— The distinction between personnel policy and union contracts in informally resolving complaints in a labor relations unit; or

— The relative degree to which applicant experience meets various rating factors and the ranking of applicants based on their potential ability to perform specific work.

FACTOR 5, SCOPE AND EFFECT

"Scope and Effect" covers the relationship between the nature of the work, i.e., the purpose, breadth, and depth of the assignment, and the effect of work products or services both within and outside the organization.

For assistants in this occupation, effect measures such things as whether the work output facilitates the work of others, provides timely services of a personal nature, or affects the adequacy of personnel services and systems. Effect alone does not provide sufficient information to properly understand and evaluate the impact of the position. The scope of the work completes the picture, allowing consistent evaluations. Only the effect of properly performed work is considered.

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Level 5-2 — 75 points

At this level, the work involves the execution and/or explanation of personnel rules, regulations, or procedures and recurring limited techical services and practices of the specialty to which assigned, for example:

— In employee development work, monitoring employees in upward mobility programs by checking on their progress and resolving conflicts in schedules;

— In staffing/examining work, screening job applicants on minimum qualifications for initial entry onto a competitor inventory;

— In classification work, verifying job content in establishing IA positions;

— In employee services work, developing documentation for workers' compensation claims.

The work products or services affect the accuracy, acceptability, or reliability of further personnel processes or products; for example:

— Monitored upward mobility programs have continuity and fewer dropouts;

— Accuracy in screening job applicants affects the quality of competitor inventories and facilitates later rating processes;

— Accuracy in establishing IA positions affects the quality of the classification program;

— Full documentation of claims facilitates the adjudication process.

Level 5-3 — 150 points

Various technical actions are taken and problems are resolved according to established personnel management criteria or practices appropriate to the specialty area, for example:

— In employee development, the work includes adjusting lesson plans and teaching points for basic subjects to fit the interests of employees, their learning rates, etc;

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GS-203
Part II

— In staffing, the work includes rating employees for promotion on the basis of their relative abilities for work in specific lower grade jobs and ranking into categories, such as qualified, highly qualified, and best qualified;

— In classification, the work includes applying a variety of standards in determining the titles, grades, and series codes of clerical and technical positions;

— In employee relations, the work includes counseling on a variety of minor disciplinary problems.

The work products or services have a direct effect upon employees and the adequacy of specialized personnel activities, for example:

— Employees attending training courses are usually motivated to learn the basic subjects taught; the knowledges acquired result in improved performance in current jobs;

— Employees ranked in the best qualified group have a better opportunity for being promoted;

— Employees classified in clerical and technical positions receive the pay of the grade assigned to their positions;

— Employees counseled regarding minor disciplinary problems are usually motivated to make changes such as developing plans to pay off overdue debts or changing mode of transportation to work to avoid unplanned absences or tardiness.

FACTOR 6. PERSONAL CONTACTS

This factor includes face-to-face and telephone contacts with persons not in the supervisory chain. (Note: Personal contacts with supervisors are covered under Factor 2, Supervisory Controls.) Levels described under this factor are based on what is required to make initial contact, the difficulty of communicating with those contacted, and the setting in which the contact takes place (e.g., the degree to which the employee and those contacted recognize their relative roles and authorities.)

Above the lowest level, points should be credited under this factor only for contacts which are essential for successful performance of

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the work and which have a demonstrable impact on the difficulty and responsibility of the work performed.

The relationship between Factors 6 and 7 presumes that the same contacts will be evaluated for both factors. Therefore, use the personal contacts which serve as the basis for the level selected for Factor 7 as the basis for selecting a level for Factor 6.

Level 6-1 — 10 points

Personal contacts are with employees within the office to which assigned and units involved in related functions such as the payroll office and the computer support staff.

Level 6-2 — 25 points

Personal contacts are generally with all levels of employees, supervisors, union representatives, and administrative staffs in the organization served or in support facilities located in the same geographic area or in regional, district, or field offices;

AND/OR

Contacts are with members of the general public from all walks of life in a moderately structured setting such as applicants inquiring about examination ratings, agency personnel representatives, former employees, relatives of employees, physicians' offices, agency claim or retirement offices, law enforcement or court representatives, training vendors and outside speakers, union or grievance arbitrators, or school officials.

FACTOR 7, PURPOSE OF CONTACTS

In this occupation, purpose of personal contacts may range from factual exchanges of information to situations involving differing viewpoints goals, or objectives. The personal contacts which serve as the basis for the level selected for this factor must be the same as the contacts which are the basis for the level selected for Factor 6.

BEST COPY AVAILABLE

GS-203
Part II

Level 7-1 — 20 points

In personal contacts, the assistant obtains, clarifies, or gives facts or information directly related to the work, for example:

— Obtaining facts about jobs, applicant experience, rumors, etc;

— Answering questions regarding how to apply for various employee benefits; and

— Providing information pertaining to various kinds of leave (military, court, maternity, etc.) and the documentation required.

Level 7-2 — 50 points

At this level, the assistant regularly has personal contacts which involve resolving minor problems, obtaining cooperation of others, or reaching mutual agreements; e.g., one or more of the following:

— Resolving or clarifying the discrepancies or deficiencies in subject-matter content (such as differences between position description and duties described in job audit or between personnel records and applicant's background statements) when mutual agreement can be readily obtained;

— Investigating rumors, complaints, or misunderstandings about personnel requirements or management's proposed actions; reassuring and convincing individuals that there is no cause for concern;

— Counseling employees concerning excessive unplanned absences or inability to manage debts; being supportive, yet persuasive, in attempting to bring about change in employee's attitudes or habits;

— Motivating committee members or students (e.g., guiding a panel in rating applications for lower grade positions) getting and maintaining the interest of students in learning basic subjects; and

— Coordinating steps required to accomplish personnel actions such as exploring alternative ways of filling vacancies depending upon the urgency of the need and the availability of eligibles; arranging suitable release dates.

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On occasion, to obtain the desired effect, considerable tact, patience, and skill may be required in approaching irate, apprehensive, or uninformed individuals.

FACTOR 8, PHYSICAL DEMANDS

The "Physical Demands" factor covers the requirements and physical demands placed on the employee by the work assignment. This includes physical characteristics and abilities (e.g., specific agility and dexterity requirements) and the physical exertion involved in the work (e.g., climbing, lifting, pushing, balancing, stooping, kneeling, crouching, crawling, or reaching). To some extent, the frequency or intensity of physical exertion must also be considered, e.g., a job requiring intermittent physical effort.

NOTE: Regulations governing pay of irregular or intermittent duty involving unusual physical hardship or hazard are in Chapter 550, *Federal Personnel Manual*.

Possible levels of "Physical Demands" are the same for personnel assistants and for personnel clerks.

Level 8-1 — 5 points

No special physical demands are required. The work is primarily performed while sitting. However, some movement may be needed to obtain records from file drawers in the office, to visit offices in the building, or to drive an automobile to other locations.

Level 8-2 — 20 points

The work requires long periods of continual standing at a counter, with frequent movement to obtain forms from another location and return to counters.

FACTOR 9, WORK ENVIRONMENT

This factor considers the risks and discomforts in the employee's physical surroundings or the nature of the work assigned and the safety regulations required. Although the use of safety precautions can practically eliminate a certain danger or discomfort, such situa-

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GS-203
Part II

tions typically place additional demands upon the employee in carrying out safety regulations and techniques.

NOTE: Regulations governing pay for irregular or intermittent duty involving unusual physical hardship or hazard are in Chapter 550, *Federal Personnel Manual.*

Level 9-1 — 5 points

The work environment of personnel assistants is the same as that for personnel clerks—everyday risks or discomforts which require normal safety precautions typical of such places as offices, meeting and training rooms, libraries, residences, or commercial vehicles; e.g., use of safe work practices with office equipment, avoidance of trips and falls, or observance of fire regulations and traffic signals. The work area is adequately lighted, heated, and ventilated.

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OPM Benchmark Description

Series	Grade	BMK #
GS-203	06	01

STAFFING ASSISTANT

Duties

Evaluates skills of candidates for placement on clerical promotion registers; matches students to jobs considering basic skills for positions under special hiring authorities; screens applications for minimum eligibility for entry onto the applicant supply file; and performs related staffing duties.

— Responds to walk-in applicants and telephone callers who are interested in obtaining employment at the installation. Determines the kind and level of work in which they are interested and previous Federal employment to advise on employment opportunities. Accepts applications for positions for which recruiting action is in process and/or refers applicant to a personnel staffing specialist. Accepts applications for anticipated vacancies when applicant can be appointed by reinstatement and/or the jobs concerned are in a shortage category. Explains generally that initial Federal appointments are from competitive examinations; provides application forms and addresses of examining offices.

— Screens applications accepted for the applicant supply file for completeness and to determine that the minimum qualification requirements are met for the grade(s) and occupation applied for. Assigns noncompetitive ratings.

— Revises job vacancy announcements by modifying or updating standardized portions of previous announcements.

— Evaluates applications for promotion registers for clerical occupations through GS-4:

  o Determines minimum eligibility and, as required, self-certified proficiency, and

  o Evaluates supplemental applications and supervisory ratings on the basis of relative value of ability in relation to the skills, knowledges, and abilities specified by the merit promotion plan. Determines overall numerical rating.

— Coordinates the filling of lower grade positions under special hiring authorities. Contacts operating supervisors regarding basic skills needed; obtains stay-in-school applicants from the state agency;

BEST COPY AVAILABLE

Series	Grade	BMK #
GS-203	06	01

and matches applicants to jobs. Helps the mentally retarded in preparing for interviews and in completing application forms.

— Interviews and selects typists for the typing pool.

— Performs related staffing work such as scheduling employees for noncompetitive tests; requesting OPM certificates and agency referral lists; arranging for interviews; preparing promotion referral certificates; notifying candidates of selections and obtaining release dates; entering data on personnel request form and forwarding for processing.

Factor 1, Knowledge Required by the Position — Level 1-4 — 550 points

— Practical knowledge of evaluation techniques for applying qualification standards in determining minimum eligibility for a wide variety of occupations and grade levels. (550 points)

— Knowledge of merit promotion requirements/procedures and an understanding of the characteristics of clerical occupations to evaluate and document the relative value of individual qualifications using specified rating factors. (550 points)

— Knowledge of staffing needs, forms, procedures, and regulations to perform work such as screening walk-in applicants, answering questions about employment opportunities, revising promotion announcements for recurring vacancies, maintaining the applicant supply file, requesting certificates of eligibles or referral lists of candidates, arranging for interviews, obtaining release dates, and coding personnel data. (350 points)

Factor 2, Supervisory Controls — Level 2-3 — 275 points

The supervisor defines the overall objectives and priorities of the work and helps the assistant with controversies which may arise, e.g., an employee complaint that a supervisor discriminated in the selection process.

The assistant plans and carries out work; adapts procedures to meet established priorities considering the number, source, and quality of candidates, urgency in filling the job, etc.

BEST COPY AVAILABLE

Series	Grade	BMK #
GS-203	06	01

Job vacancy announcements, promotion certificates for clerical positions, and proposed appointments and selections for lower grade positions are reviewed for overall appropriateness, technical soundness, and conformity to policies and regulations. Individual ratings are not normally reviewed.

Factor 3, Guidelines — Level 3-2 — 125 points

Uses a variety of qualification standards, position descriptions, FPM issuances, merit promotion procedures, and agency policies and guides.

The bulk of the work pertains to lower-grade positions involving basic skills, readily understood kinds of work, and simple qualification requirements which can be readily applied with minor variations such as substitution of education for general experience. Many of the qualification decisions regarding accepting applications for the applicant supply file can be made on the basis of former Federal employment in the positions and eligibility for noncompetitive appointment.

Factor 4, Complexity — Level 4-3 — 150 points

Performs technical staffing duties which include evaluating and ranking applicants for clerical positions on their relative abilities and screening applications for entry on the applicant supply file.

Determines whether applications can be accepted under direct hire authority or for the applicant supply file considering immediate and anticipated staffing needs and possible eligibility of applicant for noncompetitive appointment. Determines the degree to which applicant backgrounds meet specified MPP factors for clerical positions and assigns point values. Determines that minimum eligibility requirements are met for a variety of positions.

Experience and equivalent training is evaluated as generally related or directly related. Total point ratings for promotion are used in determining the qualified, highly qualified, and best qualified candidates.

Factor 5, Scope and Effect — Level 5-3 — 150 points

Applications are rated and rankings are assigned according to established criteria and technical staffing methods.

BEST COPY AVAILABLE

Series	Grade	BMK #
GS-203	06	01

The relative position of clerical employees on registers affects their opportunities for promotion and contributes to the filling of agency positions with the best qualified people.

Factor 6, Personal Contacts — Level 6-2 — 25 points

Personal contacts are with operating supervisors, employment and examining offices, schools, applicants, employees, releasing personnel offices, former employers, and other staff members.

Factor 7, Purpose of Contacts — Level 7-2 -- 50 points

Contacts are for the purpose of coordinating work to fill vacant positions, e.g., consulting operating offices regarding basic skills for positions to be filled under the stay-in-school program; contacting employment offices regarding suitable candidates; discussing alternate ways of filling vacancies for clerical positions depending upon the availability of candidates; and arranging suitable release dates for selectees.

Factor 8, Physical Demands — Level 8-1 — 5 points

The work is performed primarily while sitting. Movement is required to obtain records from file drawers or to visit operating offices.

Factor 9, Work Environment — Level 9-1 — 5 points

The staffing assistant works in a comfortable office setting.

TOTAL POINTS — 1335

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OPM Benchmark Description

Series	Grade	BMK #
GS-203	07	01

STAFFING ASSISTANT

Duties

Provides technical support in recruitment and placement activities, which includes developing new vacancy announcements and applying qualification standards and merit promotion ranking procedures for a wide variety of clerical and technical positions.

— Reviews personnel requests to determine the nature of staffing action and source of candidates (merit promotion, applicant supply file, outside resources, or OPM certificate). For reassignments, determines that the position number is valid or an IA may be established; that the target position does not have promotion potential; and the effective date and appropriate action codes. For recruitment, prepares requests for OPM certificates or obtains applications for rating under direct hire authority. Contacts applicants regarding their interests; explains to supervisors how veterans' preference and "rule of three" affect the selection process; as required, checks references by telephone or form letter; consults with the selectees and releasing offices to set EOD dates.

— Writes recurring and new vacancy announcements for clerical and technical positions. Compares similarity of the classification and job content to previous jobs filled in determining the appropriateness of previous announcement for recurring vacancies. Writes new announcements by abstracting a duties statement from the position description and the minimum years of general and specialized experience required to qualify from the qualification standard. Determines the area of consideration according to MPT requirements.

— Rates applications for promotion to positions covered by qualification standards in a wide variety of clerical and technical occupations. Determines that minimum qualification requirements are met (screens in) and that performance appraisals are current. Evaluates relative quality and assigns point values for experience, training, outside activities, and performance in relation to specific jobs according to the local merit promotion plan. Interviews employees to clarify information relative to their applications.

BEST COPY AVAILABLE

Series	Grade	BMK #
GS-203	07	01

— Answers questions of management regarding the availability of candidates, procedures to be followed, and estimated time required to recruit new employee or complete promotion action. Answers questions of employees regarding their ratings for promotion or standings on registers.

— Performs miscellaneous clerical work such as preparing biweekly reports; maintaining promotion files; arranging for job interviews and preemployment physical examinations; sending notification letters; requesting and returning OPM certificates.

Factor 1, Knowledge Required by the Position — Level 1-5 — 750 points

— Practical knowledge of evaluation techniques for applying a wide variety of qualification standards to screen in candidates meeting the basic requirements. (550 points)

— A practical knowledge of staffing principles, knowledge of the local merit promotion plan, and an understanding of occupational characteristics to develop promotion announcements and to analyze and evaluate the relative value of individual qualifications in relation to duties of specific positions in a variety of clerical and technical occupations. (750 points)

— Knowledge of recruiting/staffing forms, procedures, and requirements to obtain OPM certificates; to observe the "rule of three" and veterans' preference requirements; and to coordinate job interviews, physicals, and EOD dates. (350 points)

Factor 2, Supervisory Controls — Level 2-2 — 125 points

The supervisor defines the continuing assignment with procedures and methods to be used, priorities, and deadlines. The supervisor helps the assistant with difficult or controversial aspects of recruiting and placement problems handled.

The assistant uses initiative in planning and carrying out day-to-day work.

Final work is reviewed for conformance to policies and regulations, timeliness, and satisfaction of the personnel served. Job vacancy

BEST COPY AVAILABLE

Series	Grade	BMK #
GS-203	07	01

announcements and promotion certificates are checked for technical adequacy at the time of signature by the staffing specialist. Evaluations involving technical, complex, or unfamiliar occupations are closely reviewed.

Factor 3, Guidelines — Level 3-3 — 275 points

The assistant uses a variety of qualification standards, the merit promotion plan, position descriptions, FPM issuances, and agency instructions and policies. Qualification standards and ranking guidelines have criteria and examples which apply generally, but not specifically, to the jobs to be filled or the experience/training to be evaluated.

The assistant adapts and interprets the general guides and identifies major duties to be used as measurement criteria in evaluating qualifications. For example, a qualification standard indicates that an applicant must have "X" number of years of experience (or equivalent education) to demonstrate potential ability to do the work at the grade of the job being filled. The assistant determines what the important duties are in the job being filled and whether applicants have the equivalent of at least one year of experience at the next lower grade. Uses judgment in modifying procedures to fit the needs of the staffing actions being taken.

Factor 4, Complexity — Level 4-3 — 150 points

Performs technical personnel staffing duties which includes evaluating and ranking qualifications for a variety of positions and writing new job vacancy announcements.

Determines kind of staffing action to be taken (reassignment, repromotion, promotion, temporary promotion, new appointment, reinstatement, etc.) and the best potential source of candidates. Identifies the duties of the positions being filled and reviews the backgrounds of applicants to determine that minimum eligibility requirements are met. Develops new announcements as needed. Determines the relative degree to which experience/training of applicants meets specified merit promotion factors.

BEST COPY AVAILABLE

Series	Grade	BMK #
GS-203	07	01

Applicant experience is evaluated as generally related; directly related; equivalent education or training; and minimum, good, or superior quality in relation to duties of the variety of positions filled.

Factor 5, Scope and Effect — Level 5-3 — 150 points

Various staffing actions and problems are resolved in accordance with established criteria, technical staffing methods, and previous experience with candidate sources.

The numerical ratings assigned have a bearing on the ranking of employees for promotion and their opportunities for promotion. This work contributes to the filling of agency positions with the best qualified people.

Factor 6, Personal Contacts — Level 6-2 — 25 points

Personal contacts are with operating supervisors, the medical office, releasing personnel offices, former employers, applicants, employees, examining offices, sources of candidates, and other staff members.

Factor 7, Purpose of Contacts — Level 7-2 — 50 points

In planning to fill vacancies, discusses with operating supervisors the availability of candidates for specific vacancies, the similarity of jobs for like recruitment treatment, optional procedures to be followed, and the estimated time needed to fill the job(s). Contacts previous employers to arrange release dates or obtain information about a candidate's suitability. Considerable tact and diplomacy may be required in dealing with employees who are dissatisfied with their rankings or nonselection for promotion.

Factor 8, Physical Demands — Level 8-1 — 5 points

The work is performed primarily while sitting. Movement is required to obtain records from file drawers or to visit operating offices.

Factor 9, Work Environment — Level 9-1 — 5 points

The staffing assistant works in a comfortable office setting.

TOTAL POINTS — 1535

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OPM Benchmark Description

Series	Grade	BMK #
GS-203	07	02

STAFFING ASSISTANT

Duties

As part of an examining team, applies simple rating schedules for specific entry-level GS-9 positions.

— Screens applications submitted under the Mid-Level Examination for completeness and to determine that minimum requirements for eligibility are met in the occupation applied for at the grade levels covered by the announcement. Substitutes education for experience as permitted by the qualification standard. Makes notes for typist to request missing or additional data needed for the legal review or to evaluate qualifications.

— Rates applications for GS-9 positions by evaluating the quality of applicant experience/training in relation to the selective and ranking factors in the rating schedules designed for specific positions. Documents ratings using a ranking form. Determines points to be assigned for veterans' preference. Assigns a numerical rating to the application for the particular certificate requested.

— Determines how many names to certify considering the number of vacancies; the normal rate of declinations for a particular occupation or location; and whether it is a name request. Lists names in rank order, breaking ties using a random "number of the day."

— Rotates as "Counselor of the Day" to answer questions of walk-in applicants or telephone calls. Responds to letters from applicants regarding examining questions and where to apply for jobs.

Factor 1, Knowledge Required by the Position — Level 1-5 — 750 points

— Practical knowledge of evaluation techniques and an understanding of characteristics of administrative occupations to evaluate and document the relative value of individual qualifications in relation to selective and ranking factors in rating schedules for a variety of GS-9 positions. (750 points)

— Practical knowledge of the evaluation techniques for applying qualification standards in determining minimum eligibility for entry onto a deferred-rated inventory for a variety of administrative occupations. (550 points)

BEST COPY AVAILABLE

Series	Grade	BMK #
GS-203	07	02

— Knowledge of standard examining procedures and requirements to prepare certificates in rank order, to return applications for additional or missing information, and to answer questions regarding how to apply for jobs covered by a variety of examinations. (350 points)

Factor 2, Supervisory Controls — Level 2-2 — 125 points

The supervisor defines the continuing assignment and priorities of the work. The supervisor helps the assistant with difficult aspects of rating schedules or evaluations or occupations not encountered before.

The assistant carries out day-to-day work according to established procedures.

Certificates of eligibles are checked by the supervisor at the time of signature for accuracy, and conformity to instructions. Questionable ratings are closely reviewed.

Factor 3, Guidelines — Level 3-3 — 275 points

Uses qualification standards for administrative positions, rating schedules for GS-9 positions, examination announcements, position descriptions, agency examining instructions, and local guides. Qualification standards have criteria and examples which apply generally, but not specifically, to the applications being rated.

The assistant uses considerable judgment in consistently applying and adapting general evaluation concepts, comparing factors in rating schedules of specific jobs to experience and education in different applications, and determining the degrees to which factors are met.

Factor 4, Complexity — Level 4-3 — 150 points

Screens applications on minimum qualifications for administrative occupations in grades GS-9 through GS-12; applies rating schedules for assigned entry-level GS-9 positions.

Determines the creditability of experience/education of applicants in connection with factors in rating schedules. Determines the

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Series	Grade	BMK #
GS-203	07	02

relevancy of college courses to occupation applied for in substituting education for specialized experience.

Experience is evaluated as generally related or directly related (specialized) and numerical ratings are assigned to represent qualified, highly qualified, and best qualified groupings in preparing certificates of eligibles.

Factor 5, Scope and Effect — Level 5-3 — 150 points

A variety of applications are rated and ranked according to established examining criteria and technical staffing methods.

The decisions made affect opportunities of applicants for employment; e.g, whether they will be within reach for particular jobs and their relative positions on certificates of eligibles furnished to appointing offices.

Factor 6, Personal Contacts — Level 6-2 — 25 points

Contacts are with applicants and their representatives, agency personnel offices, and other members of the examining team.

Factor 7, Purpose of Contacts — Level 7-1 — 20 points

Requests additional information needed to rate applications; answers questions regarding such matters as opportunities for employment from the examination or how to apply under other examinations; updates applicant data and extends date of eligibility upon request. Advises on possibility of being able to reach a certain name in the certification process. Answers typist's questions regarding material being typed.

Factor 8, Physical Demands — Level 8-1 — 5 points

The work is sedentary with some movement to transport stacks of applications (10 to 15 pounds) or to obtain file records.

Factor 9, Work Environment — Level 9-1 — 5 points

The work is performed in an office setting.

TOTAL POINTS — 1505

BEST COPY AVAILABLE

Series	Grade	BMK #
GS-203	07	03

OPM Benchmark Description

STAFFING ASSISTANT

Duties

Provides technical support in staffing activities for a segment of the organization. The recruitment and placement work includes instructing promotion panels in the development of crediting plans for lower grade positions in clerical and technical occupations and in the evaluation of candidates against these crediting plans.

- Evaluates applications for laborer and janitor received under direct hire authority, using job element crediting plans. Maintains separate inventories for veterans and nonveterans.
- Evaluates applications for temporary appointment to Nurse GS-7 on the basis of minimum eligibility.
- Coordinates actions required to fill clerical and lower grade technical positions by promotion, as assigned. Determines if there are names on the reemployment priority list. Writes or revises vacancy announcements. Reviews applications received to determine whether minimum eligibility requirements are met. Schedules promotion panel; requests union and EEO representatives to serve on panel when position is in a bargaining unit.
- Assists panel in evaluating applications for clerical and lower grade technical positions in relation to knowledges, skills, and abilities (KSA's) in the crediting plan and determining total points. Sets up promotion register and refers the best qualified to the selecting supervisor.
- Conducts job interviews and selects applicants for the typing pool.
- Coordinates development of crediting plans for clerical and lower grade technical positions. Reviews job prior to meeting to tentatively identify major duties. Explains the forms to be used and gives examples of how to rank levels of KSA's in relation to the job to be filled. Explains use of paired-comparisons in ranking KSA's on the basis of importance. Explains documentation of critical KSA's in relation to major duties.
- Performs miscellaneous clerical work such as requesting certificates of eligibles; sending inquiries; arranging for job interviews with selecting supervisors; notifying selectees of EOD date;

BEST COPY AVAILABLE

Series	Grade	BMK #
GS-203	07	03

coordinating objections to eligibles with the medical and security offices; auditing and returning certificates or requesting extensions; completing personnel action requests to show new salary; authority for action, etc.; obtaining new PD number when position is filled at a lower grade.

Factor 1, Knowledge Required by the Position — Level 1-5 — 750 points

— Practical knowledge of job analysis techniques specified by the merit promotion plan to guide a panel in identifying, ranking, and documenting levels of knowledge, skills, and abilities in crediting plans for clerical and lower grade technical positions. (750 points)

— Practical knowledge of the evaluation techniques for applying qualification standards in determining minimum eligibility of candidates for recurring vacancies in clerical, lower grade technical positions, lower grade trades and labor positions, and a few entry-level professional positions. (550 points)

— Knowledge of staffing forms, procedures, and requirements to perform clerical work such as obtaining OPM certificates; arranging for interviews and physical examinations; maintaining registers established under direct hire authority; and coding personnel action request. (350 points)

Factor 2, Supervisory Controls — Level 2-2 — 125 points

The supervisor defines the continuing assignment and priorities of the work. The supervisor helps the assistant with difficult or controversial aspects of recruiting and placement problems.

The assistant uses initiative in planning and carrying out day-to-day work according to established policy and regulations.

Job vacancy announcements and crediting plans are checked for technical adequacy and conformance to MPP requirements at the time of signature by the supervisor. Questionable ratings or evaluations involving technical, complex, or unfamiliar occupations are closely reviewed.

BEST COPY AVAILABLE

Series	Grade	BMK #
GS-203	07	03

Factor 3, Guidelines — Level 3-3 — 275 points

The assistant uses qualification standards, the merit promotion plan, position descriptions, FPM issuances, agency instructions, and policies. Guidelines have specific procedures and forms for developing crediting plans for evaluating candidates for promotion to clerical or lower grade technical positions.

The assistant uses considerable judgment in consistently applying general evaluation concepts; identifying major duties of jobs; guiding panels in the identification and documentation of skills, knowledges, and abilities for crediting plans; and assisting panels in the application of the crediting plans to backgrounds of applicants.

Factor 4, Complexity — Level 4-3 — 150 points

Performs technical staffing duties which include evaluating qualifications for recurring vacancies in clerical, technical trades and labor positions, and a few entry-level professional positions.

Identifies major duties of positions being filled and compares with backgrounds of applicants under the promotion program and direct hire authorities to determine minimum eligibility is met at various grades; substitutes education for experience. Writes job vacancy announcements for recurring vacancies. Guides panel in development of crediting plans (ranking of KSA's, use of paired comparisons, and documentation of job-relatedness) and evaluation of candidates using ranking factors.

Experience and equivalent training is evaluated as generally related or directly related. Point values assigned for levels of ability in relation to specific KSA's. Total point ratings for promotion are used in determining the qualified, highly qualified, and best qualified candidates.

Factor 5, Scope and Effect — Level 5-3 — 150 points

Various qualification determinations are made in accordance with established criteria and technical staffing methods.

BEST COPY AVAILABLE

Series	Grade	BMK #
GS-203	07	03

The ranking of employees in qualified, highly qualified, or best-qualified groups affect their opportunities for promotion and contribute in the filling of agency positions with the best qualified people.

Factor 6, Personal Contacts — Level 6-2 — 25 points

Personal contacts are with operating supervisors, panel members, the medical and security offices, releasing personnel offices, union representatives, former employers, applicants, employees, examining offices, other sources of candidates, and other staff members.

Factor 7, Purpose of Contacts — Level 7-2 — 50 points

Coordinates promotion actions by obtaining panelists, scheduling meetings, and explaining merit promotion evaluation and documentation requirements and procedures; the panel members are basically cooperative in developing crediting plans and evaluating candidates. Contacts releasing offices for EOD dates.

Factor 8, Physical Demands — Level 8-1 — 5 points

The work is sedentary with some movement to transport stacks of applications (10 to 15 pounds) or to obtain file records.

Factor 9, Work Environment — Level 9-1 — 5 points

The work is performed in an office setting.

TOTAL POINTS — 1535

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